

REM User Manual

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1 Rare and Expensive Case Management Program (REM)

Rare and Expensive Case Management (REM) is a Medicaid program that provides case management services and other optional services to eligible individuals with specific rare and expensive medical conditions.

In order to be eligible for the REM program, individuals must have documentation of a specific REM qualifying diagnosis and must meet the age limit criteria tied to the specific REM qualifying ICD 10 code. At present, the majority of the participants are children and under the age of 21, although some adults remain eligible until the age of 65.

1.1 Acronyms Used

The following acronyms are used within this user manual:

Acronym	Description
CCS	Coordination of Community Services
CFC	Community First Choice
CM	Case Manager
CMA	Case Management Agency
CMP	Case Management Plan
COMAR	Code of Maryland Regulations
DDA	Developmental Disabilities Administration
ICD	International Classification of Diseases
LOC	Level of Care
LTSS	Long Term Services and Supports
MA#	Medical Assistance Number
MCO	Managed Care Organization
MDC	Medical Day Care
MDH	Maryland Department of Health
MMIS	Medicaid Management Information System
MMIS WT	MMIS Waiver Transaction
ODF	Overall Decision Form
PCP	Primary Care Provider
POS	Plan of Service
RE	Reportable Event
REM	Rare and Expensive Case Management
RIF	REM Intake Form
SCF	Service Coordination Form
SPA	Supports Planning Agency
SSO	Single Sign-On

Table 1-REM Acronyms

1.2 Overview of REM Workflow

The workflow for REM in LTSSMaryland consists of several modules for each Client which includes Intake Process, Enrollment & Disenrollment, Case Management Services.

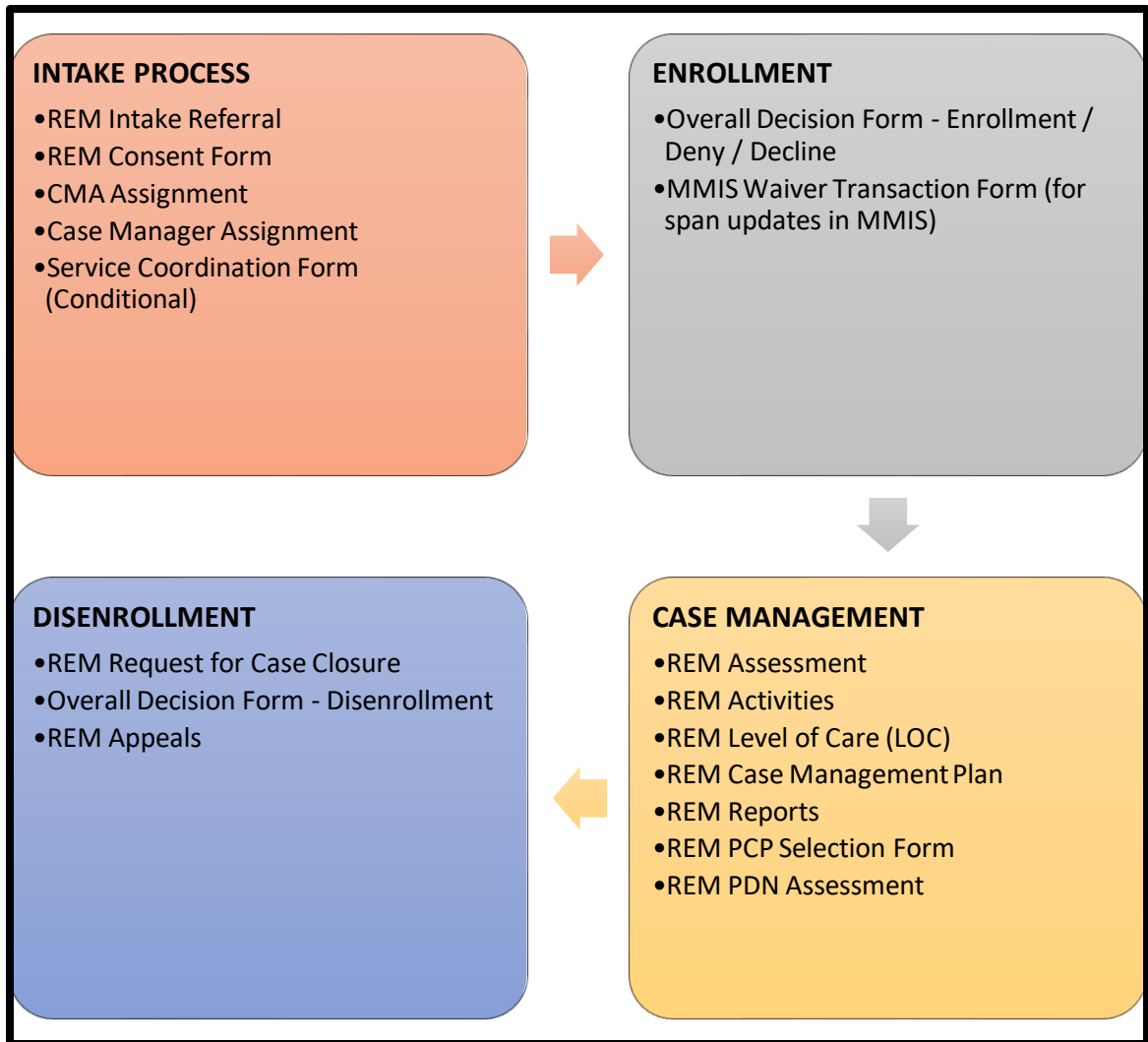


Figure 1 – REM Overall Workflow

2 Help and Contacts

For any questions regarding the LTSS system, contact the LTSSMaryland Help Desk at LTSSHelpDesk@LTSSMaryland.org or **1-855-463-5877**.

3 Getting Started

To access REM functionality, first login to LTSS Maryland and navigate to the Client summary. Follow the steps below:

3.1 Accessing LTSS Maryland Online

1. Access LTSSMaryland at: <https://LTSSMaryland.org>
2. Enter “User name” and “Password” sign in fields

Important: Do NOT share your username or password with anyone.



Figure 2 - LTSS Maryland Login

3. System navigates users to Login page
 - CMA Users click on Login. MDH Users Select MDH REM from Agency field and then click Login

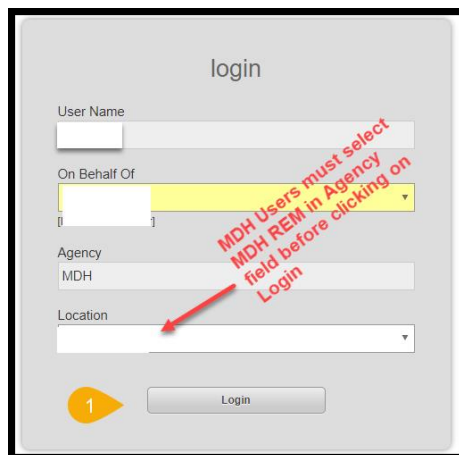


Figure 3- LTSS Login Page

3.2 Search for Clients

1. Select **Clients** tab
2. Enter Client search criteria (e.g. Client ID, last name, first name, etc.)
3. Click the **Cases** button
4. From the search results list, select the **Client Summary** hyperlink under Actions column for the desired Client to view the Client’s profile
5. The system will navigate to a Client Summary page, from where you can access REM functions for the Client.

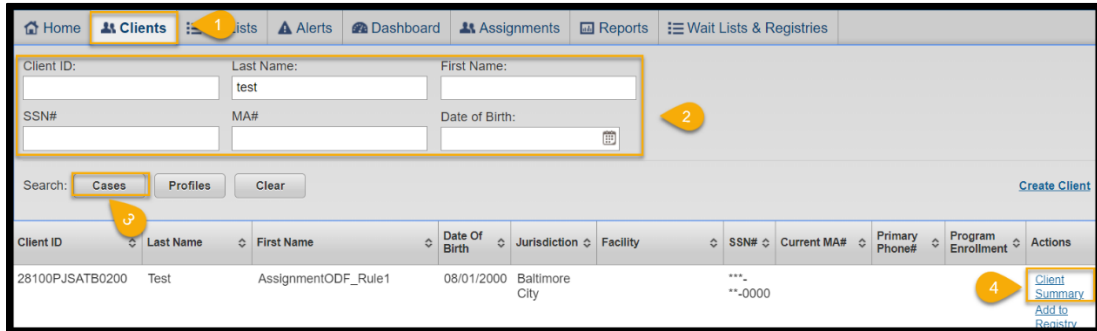


Figure 4-Client Search

NOTE: If the Client is not found in the search results, please double-check the Client search criteria that was entered. If the Client does not exist in the system, a new Client can be created using the **“Create Client”** hyperlink located on the right side of the Client Search Page.

For more details on Client Profile creation refer to **“REM Common Functions User Manual”** located on the LTSS Training website: www.LTSSTraining.org

4 REM Intake Referral Form Overview

The REM Intake Referral Form is the first step in the Client’s enrollment process. The MDH REM Unit is responsible for completing the REM Intake Referral Form. Based on the information captured in REM Intake Referral Form, a Client is identified as either approved or denied for enrollment.

This user manual details the system processes necessary to support the business requirements for the REM Intake Referral, such as adding the REM Intake Referral Form, as well as editing, viewing and managing the additional related sections.

1.1 Primary Actors

The following user roles can Add or Edit a REM Intake Referral Form:

DEPARTMENT	ROLES
MDH	MDH REM Administrator, MDH REM Intake Specialist, MDH REM Intake Nurse
Assigned CMA	CMA REM Administrator, CMA REM Case Manager, CMA REM Intake Specialist, CMA REM Provider Relations Rep, CMA REM Supervisor NOTE: CMA User roles can only edit the “In Progress” REM Intake Referral added by their agency.

Table 2-REM Intake Referral Primary Actors – Add/Edit

The following user roles can list or view the REM Intake Referral Form:

DEPARTMENT	ROLES
MDH	MDH REM Administrator, MDH REM Intake Specialist, MDH REM Intake Nurse, MDH REM Physician Advisor, MDH Admin, MDH MDC Staff, MDH MDC Admin, MDH MDC Intake. MDH Program Staff Admin, MDH Program Staff Supervisor, MDH Program Staff POS Unit staff, POS Unit Supervisor, POS Unit Admin
CMA	CMA REM Administrator, CMA REM Case Manager, CMA REM Intake Specialist, CMA Provider Relations Rep, CMA REM Supervisor
DDA Regions	Regional Nurse
Service Delivery	Assigned CCS Coordinator, CCS Supervisor from the assigned CCS Agency
Active SPA	SPA Admin, SPA Supervisor, SPA Supports Planner, SPA Intake Only from Clients Active Support Planning Agency

Table 3-REM Intake Referral Primary Actors – List/View

1.2 REM Intake Referral Form Workflow

There are multiple workflow statuses for a REM Intake Referral Form:

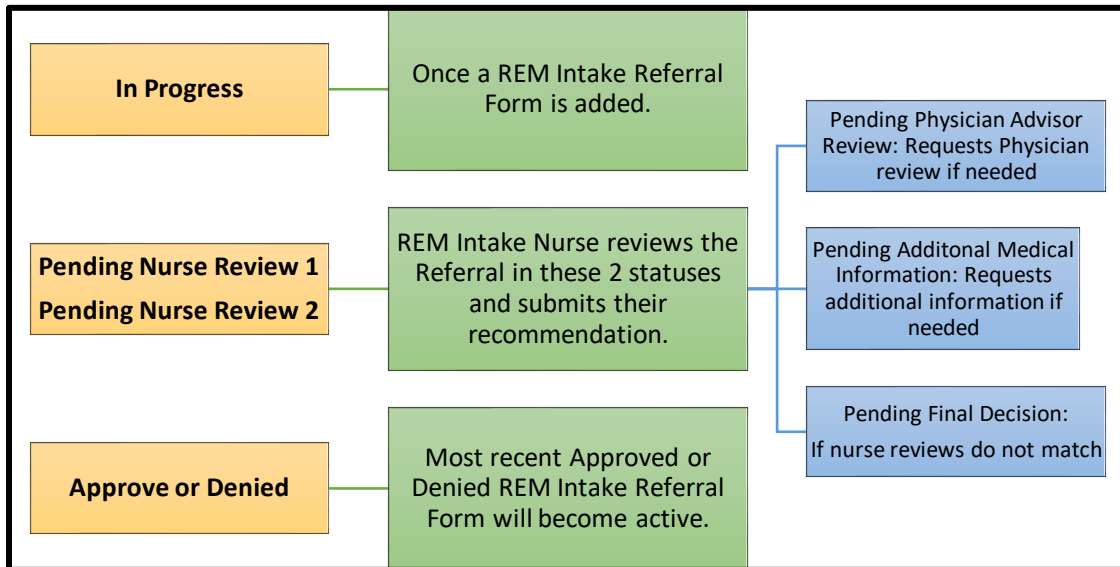


Figure 5-REM Intake Referral Workflow

4.1 Add REM Intake Referral Form

The **REM Intake Referral List** displays the list of REM Intake Referral Forms added, submitted or discarded and will provide options to View, Edit, and Print the REM Intake Referral.

NOTE: If the user did not find the Client in Client search, they must Create a new Client profile before following the steps below.

Use the following steps to Add and complete a REM Intake Referral Form:

1. From the Client Details Tab, select the **Programs** banner on the left navigation pane.
2. Select **REM Intake Referral** to navigate to the **REM Intake - List** page.

3. Click on **Add** hyperlink from **REM Intake List** Page to add a new REM Intake Referral Form and navigate to the REM Intake Summary.

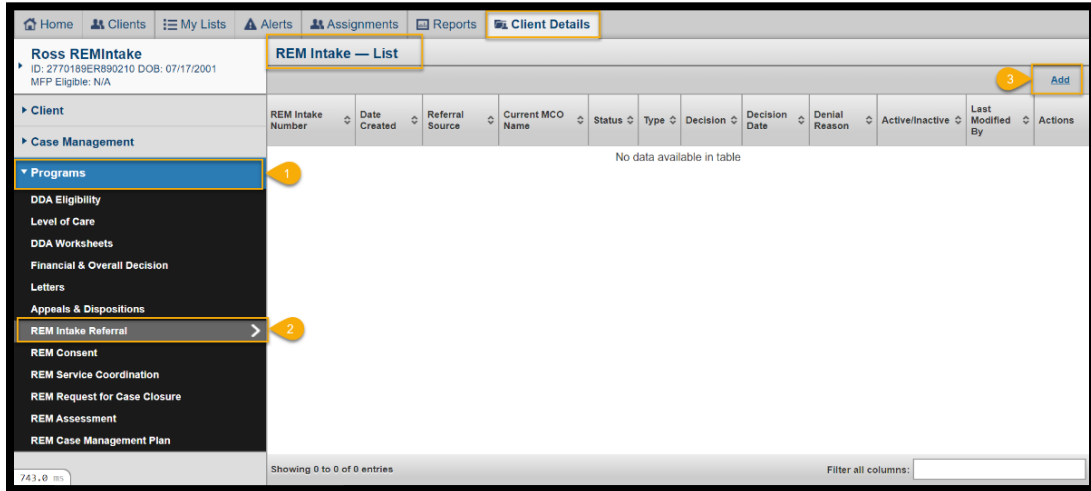


Figure 6-REM Intake Referral List View

4.1.1 REM Intake Summary

The REM Intake Summary displays the status of the REM Intake Referral Form as “**In Progress**”, the **REM Intake Number**, action buttons and sections to begin processing the REM Intake Referral Form.

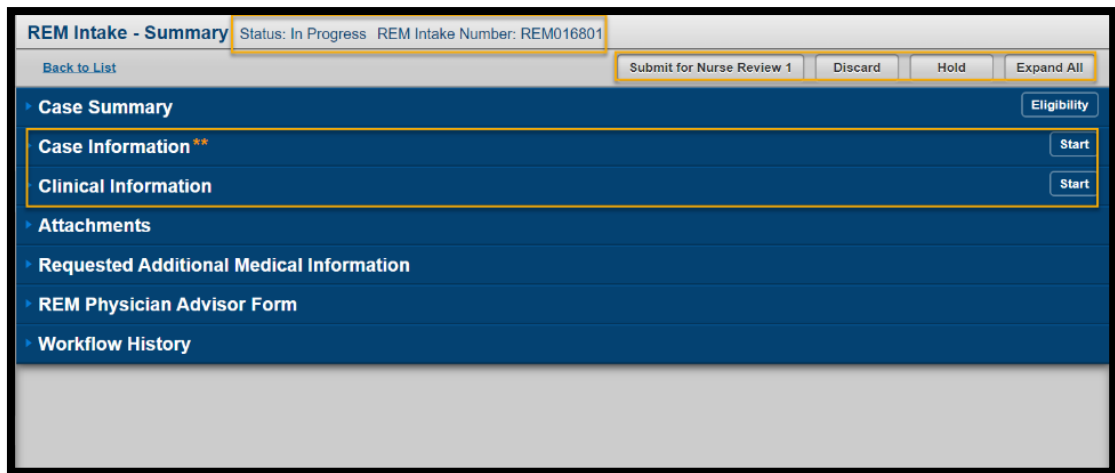


Figure 7- REM Assessment Summary

4.1.2 Case Summary

The Case Summary section is in read-only mode and is pre-populated with the Client’s demographics and case related information.

To **View** the **Case Summary** section, click the **blue banner** to expand the section:

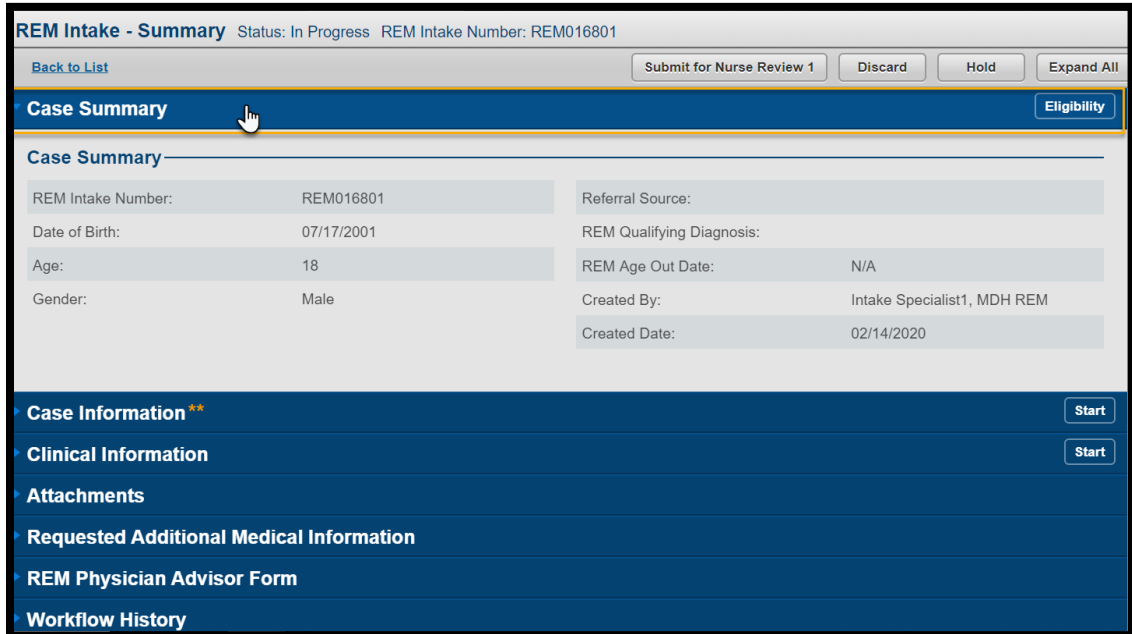


Figure 8-REM Intake Case Summary Section

- **Eligibility:** Button is available on Case Summary Panel of REM Intake Summary Page.
 - Upon clicking on this action system displays the Medicaid eligibility information Pop-up box. Eligibility Span and Special Program Code information is displayed in this pop-up box.

Medicaid Eligibility				
Active MA:	No			
Eligibility Span				
Coverage Group	Start Date	End Date	LTC/Community	
H01	N/A	N/A	Community	
Special Program Code				
Special Program	Start Date	End Date	Disenrollment Reason	Disenrollment Source
No data available in table				

Table 4-REM Intake Case Summary Section - Eligibility

4.1.3 Case Information

The Case Information section contains case related information with various required fields that are required to be completed and submitted for Nurse Review.

Use the following steps to **Start** editing the **Case Information** section:

1. Select **Start** to edit the section details.

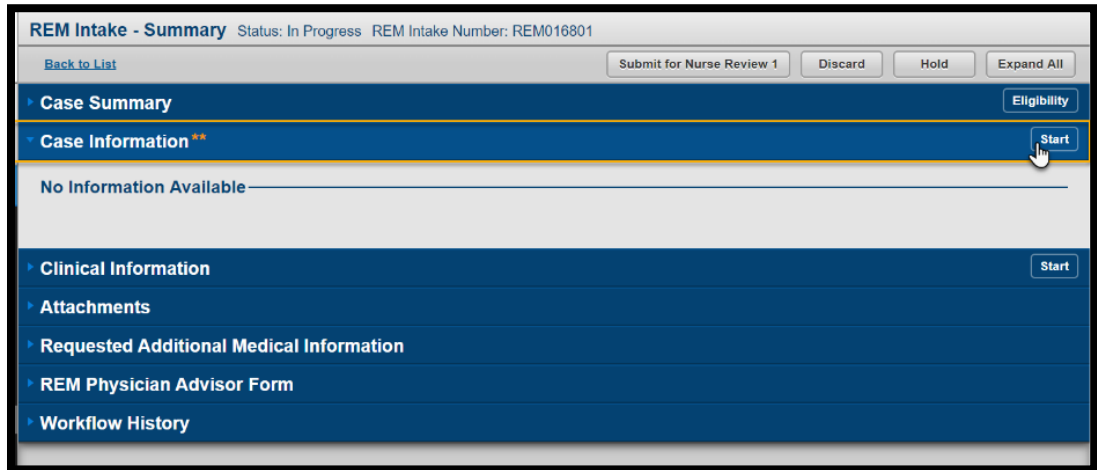


Figure 9-Start Case Information Section

2. Edit the field entries/selections, including all required fields denoted with asterisks **.

NOTE: Field selections may generate additional required sub-fields to complete the entry.

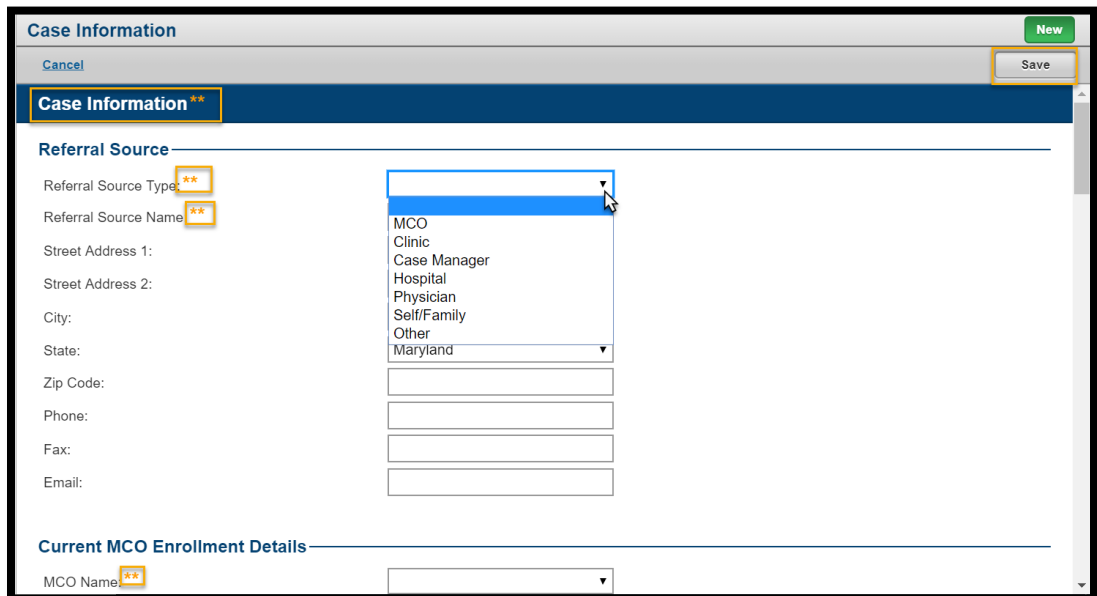


Figure 10-Edit Case Information: Referral Source

- 3. Select drop-down list arrows to display a list of pre-populated data.

The screenshot shows the 'Case Information' form with the 'Current MCO Enrollment Details' section. A 'Copy from Referral Source' button is at the top left. The 'MCO Name' field is highlighted with a yellow box and has a dropdown arrow. The dropdown menu is open, showing a list of MCO names: Aetna Better Health, AMERIGROUP Community Care, Jai Medical Systems, Kaiser Permanente, Maryland Physicians Care, MedStar Family Choice, Priority Partners, University of Maryland Health Partners, UnitedHealthcare, MCO Other, and None. Other fields like Street Address 1, City, State, Zip Code, Phone, Fax, and Email are visible but not active.

Figure 11-Edit Case Information: Current Enrollment Details

- 4. Select the **Search** option to open a search box to enter criteria to display results of imported data from MMIS, such as Physician and Provider information:

The screenshot shows the 'Case Information' form with the 'Referring Physician' section. A 'Search' button is highlighted with a yellow box and a mouse cursor. The form includes fields for Provider Name, Street Address 1, Street Address 2, City, State (set to Maryland), Zip Code, Phone, Fax, Email, Specialty, License #, MA Provider Number, Signature provided in paper form (Yes/No radio buttons), and Signature Date (with a calendar icon).

Figure 12-Edit Case Information: Search Referring Physician

- 5. Enter/Select search criteria.

The screenshot shows a 'Provider Search' window with the following fields: 'Provider Name' (empty), 'Provider Number' (empty), 'Provider Type' (dropdown menu with 'All' selected), and 'County' (dropdown menu with 'Baltimore' selected). A 'Search' button is located below the fields. Below the search area is a table header with columns: 'Provider Name', 'Provider MA Number', 'Provider Address', and 'Actions'. The table is currently empty, and the status bar at the bottom indicates 'Showing 0 to 0 of 0 entries'.

Figure 13-Edit Case Information: Enter Select Search Criteria

- 6. Click **Search** to display results and click **Select** hyperlink to pick the correct provider from the list displayed.

The screenshot shows the 'Provider Search' window after a search. The 'Search' button is highlighted with a yellow box and a mouse cursor. The table below contains the following data:

Provider Name	Provider MA Number	Provider Address	Actions
SINAI SURGERY ASSOCIATES	342101502	21 CROSSROADS DR, STE 360, OWINGS MILLS, MD 21117	Select
SINAI HOSPITAL OF BALTIMORE INC	342101504	23 CROSSROADS DR, SUITE 410, OWINGS MILLS, MD 21117	Select
SINAI HOSPITAL OF BALTIMORE INC	342101505	12221 TULLAMORE ROAD, LUTHERVILLE, MD 20193	Select
MICHAEL D ZANG MD	342102300	7602 BELAIR ROAD, BALTIMORE, MD 21236	Select
SINAI HOSPITAL OF BALTIMORE INC	342121014	12221 TULLAMORE RD, LUTHERVILLE TIMONI, MD 21093	Select
SINAI HOSPITAL OF	342121015	20 CROSSROADS DR, 100, OWINGS MILLS, MD 21117	Select

The status bar at the bottom indicates 'Showing 1 to 200 of 7793 entries'.

Figure 14-Edit Case Information: Select Search Result

NOTE: The Referring Physician Signature should be captured in the paper form before it is uploaded into the system. The Signature Date captured in the paper form should be entered in this section in order to successfully submit the REM Intake Referral Form.

Case Information New

[Cancel](#) Save

Referring Physician

Provider Name: SINAI HOSPITAL OF BALTIM...

Street Address 1: 23 CROSSROADS DR

Street Address 2: SUITE 410

City: OWINGS MILLS

State: Maryland

Zip Code: 21117-5420

Phone: (410) 601-9000

Fax:

Email:

Specialty: Physician

License #:

MA Provider Number: 342101504

Signature provided in paper form: Yes No

Signature Date:

Figure 15-Referring Physician Signature- Paper Form

7. Click **Copy from Referring Physician** to copy previously selected information from the Referring Physician section if the values are same:

Case Information New

[Cancel](#) Save

Primary Care Provider

Copy from Referring Physician

Provider Name: ****** SINAI HOSPITAL OF BALTIM...

Street Address 1: 23 CROSSROADS DR

Street Address 2: SUITE 410

City: OWINGS MILLS

State: Maryland

Zip Code: 21117-5420

Phone: (410) 601-9000

Fax:

Email:

Specialty: Physician

License #:

MA Provider Number: 342101504

Figure 16-Edit Case Information: Copy from Option

- 8. Select **Save** to save the edits and navigate to the REM Intake Summary page.

The screenshot shows a web form titled "Case Information". At the top right, there are two buttons: "New" (green) and "Save" (yellow with a black border). A mouse cursor is pointing at the "Save" button. Below the buttons is a "Cancel" link. The main section is titled "Consulting Physician" and contains several input fields: "Provider Name" (APRIL LYN YOUNG MSN CRNP), "Street Address 1" (1777 REISTERSTOWN ROAD), "Street Address 2" (SUITE 235), "City" (BALTIMORE), "State" (Maryland), "Zip Code" (21208-0000), "Phone" ((410) 486-2000), "Fax", "Email", "Specialty" (Nurse Practitioner), "License #" (R151228), and "MA Provider Number" (000600900). A "Search" button is located next to the Provider Name field.

Figure 17-Save Case Information

The screenshot shows the "REM Intake - Summary" page. At the top, it displays "Status: In Progress" and "REM Intake Number: REM016801". Below this are buttons for "Back to List", "Submit for Nurse Review 1", "Discard", "Hold", and "Expand All". The main content area has a blue header with "Case Summary" and an "Eligibility" button. Below the header, the "Case Information" section is highlighted with a blue background and a yellow border. A mouse cursor is pointing at the "Case Information" text. To the right of this section is an "Edit" button. Below the highlighted section is the "Referral Source" section, which contains input fields for "Referral Source Type" (MCO), "MCO Name" (Aetna Better Health), "Street Address 1", "Street Address 2", "City", "State" (Maryland), "Zip Code", "Phone", "Fax", and "Email".

Figure 18-View Saved Case Information Section

4.1.4 Clinical Information

The **Clinical Information** section includes the REM Qualifying Diagnosis, which is required to approve the REM Intake Referral.

Use the following steps to **Start** entering the details:

1. Select **Start** to enter the section details.

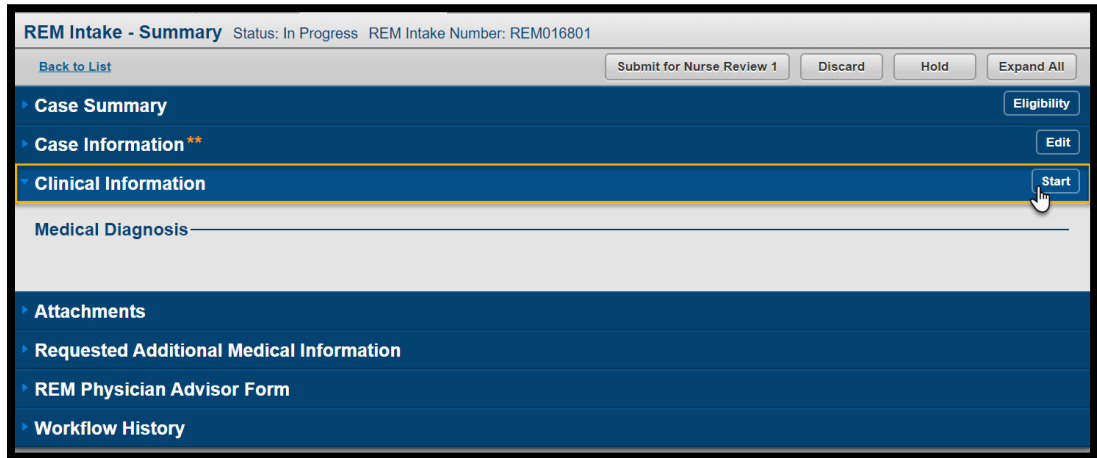


Figure 19-Start Clinical Information Section

2. Click **+Add Medical Diagnosis** to enter a Medical Diagnosis.

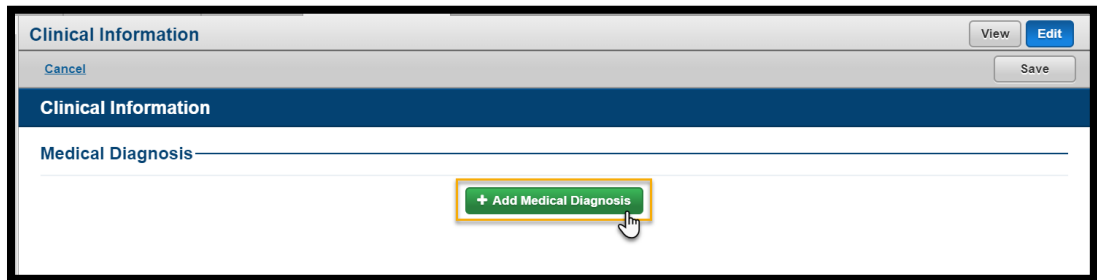


Figure 20-Edit Clinical Information: Add REM Diagnosis

NOTE: Multiple diagnoses can be added but only one can be identified as the Client’s REM Qualifying Diagnosis.

3. Select the **Search** option to open a search box.

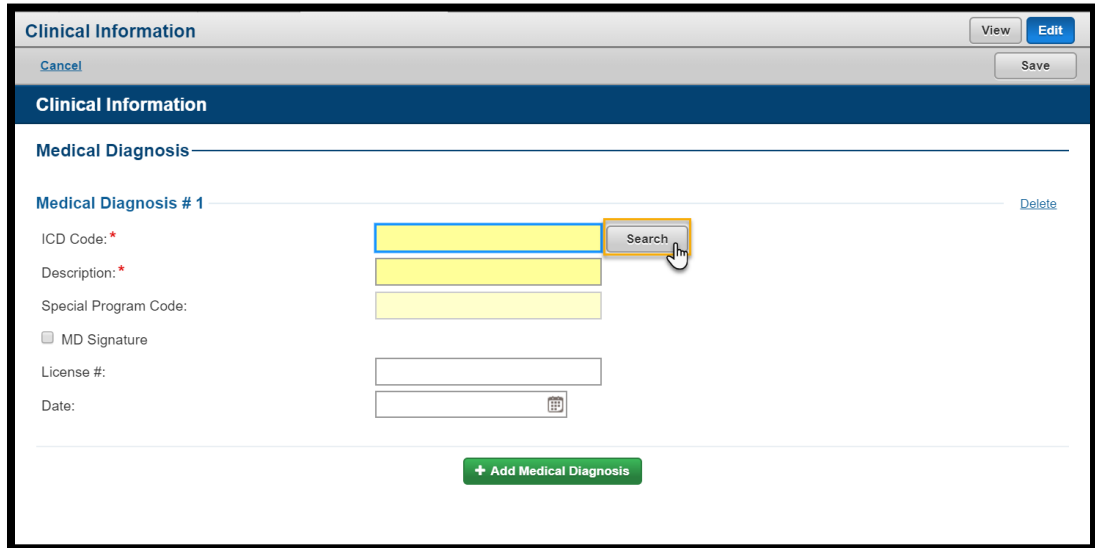


Figure 21-Edit Clinical Information: Search Medical Diagnosis

4. Enter either ICD-10 code or Description to search for a diagnosis and click **Search** to display results and click **Select** hyperlink to pick the correct Diagnosis from the list.

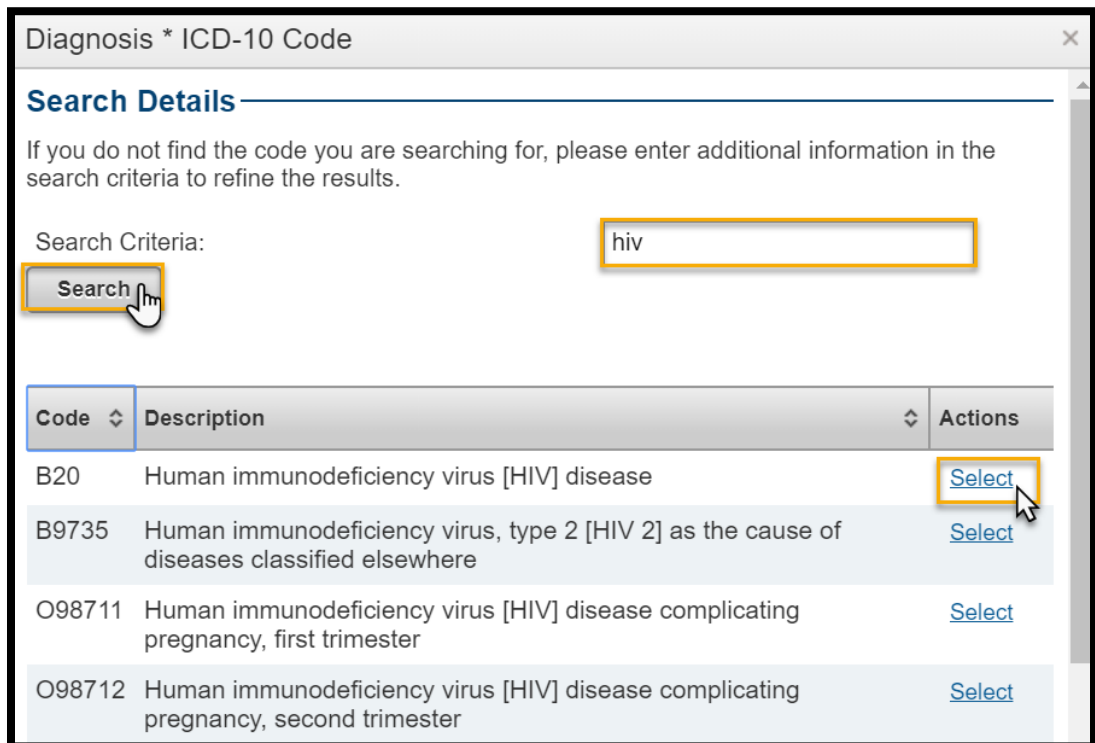


Figure 22--Edit Clinical Information: Select Search Result

- 5. Select the **Check Box** to indicate the REM Qualifying Diagnosis for Enrollment and Click **Save** to save the edits and navigate to the REM Intake Summary page.

NOTE: Multiple diagnoses can be added, but only one can be checked as the REM Qualifying Diagnosis for Enrollment. The Delete option is provided to remove entries if needed.

The screenshot shows the 'Clinical Information' form. At the top right, there are 'View', 'Edit', and 'Save' buttons. The 'Save' button is highlighted with a yellow box. Below the form title, there is a 'Cancel' button. The main section is titled 'Clinical Information' and contains a 'Medical Diagnosis' section. Under 'Medical Diagnosis # 1', there is a 'Delete' button. The form fields are: ICD Code: B20 (with a search button), Description: Human immunodeficiency virus..., Special Program Code: PSA, and a checked checkbox for 'REM Qualifying Diagnosis For Enrollment'. There are also fields for 'MD Signature', 'License #', and 'Date'. At the bottom, there is a '+ Add Medical Diagnosis' button.

Figure 23-Save REM Clinical Information

The screenshot shows the 'REM Intake - Summary' page. At the top, it says 'Status: In Progress' and 'REM Intake Number: REM016801'. There are buttons for 'Back to List', 'Submit for Nurse Review 1', 'Discard', 'Hold', and 'Expand All'. The page is divided into sections: 'Case Summary' (with an 'Eligibility' button), 'Case Information**' (with an 'Edit' button), and 'Clinical Information' (with an 'Edit' button). The 'Clinical Information' section is expanded, showing the 'Medical Diagnosis' section. The fields are: ICD Code: B20, Description: Human immunodeficiency virus [HIV] disease, Special Program Code: PSA, and a checked checkbox for 'REM Qualifying Diagnosis For Enrollment'. There are also fields for 'MD Signature', 'License #', and 'Date: N/A'. At the bottom, there is a green success message: 'Success: Record has been saved.'

Figure 24- View Saved Clinical Information Section

4.1.5 Attachments

The Attachments section displays documents linked to the respective REM Intake Referral Form.

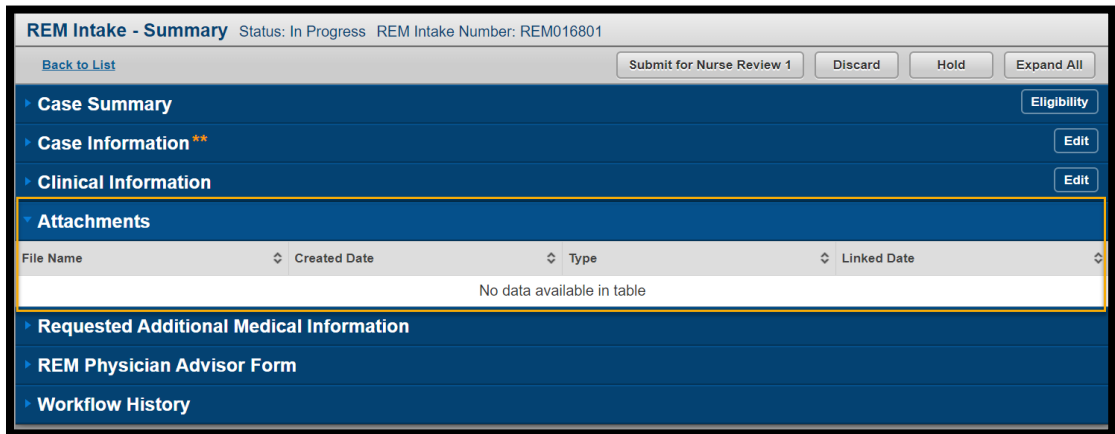


Figure 25-REM Intake Attachments

NOTE: If you have a paper document, scan and save it to your local desktop or computer in order to find it in the browse list.

Use the following steps to upload **Attachments** for the REM Intake Referral Form:

1. From the left navigation pane under **Case Management** click on **Client Attachment**.
2. Click on **Add New Attachment** displayed on the top right corner and system will display a dialog box.

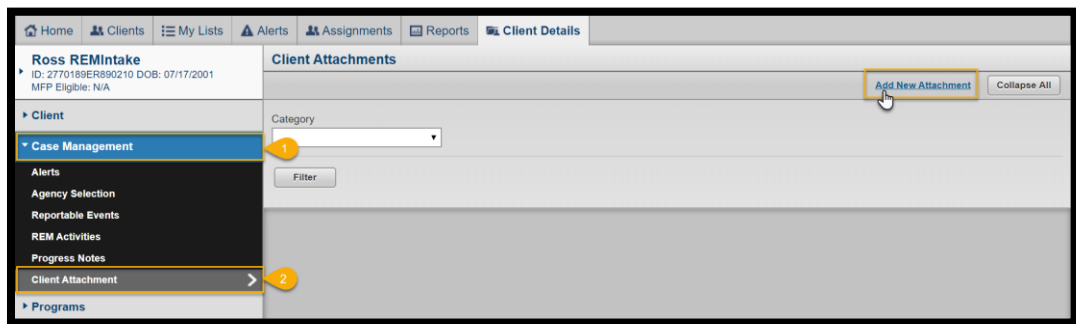


Figure 26-Add Attachments

3. Select **Choose File** to upload the document. From the **Category** field, select **REM Documents**. **Comments** field is optional. Click **Save**.

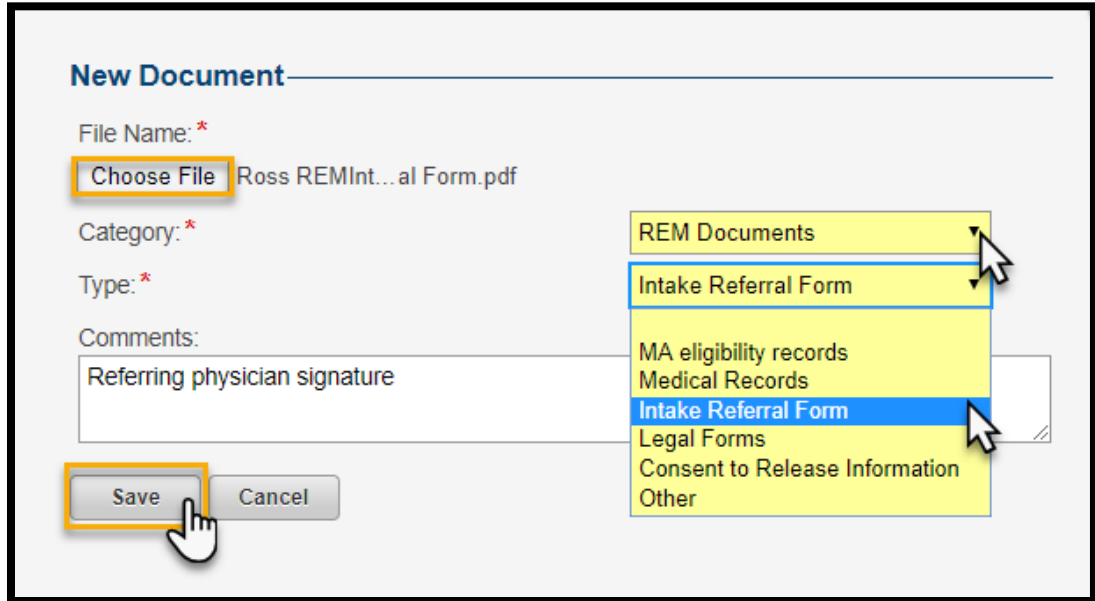


Figure 27-Save REM Document Attachments

4. To link or unlink an uploaded attachment to a REM Intake Referral Form use the **Manage Intake Link** hyperlink from the Action column of REM Documents panel.

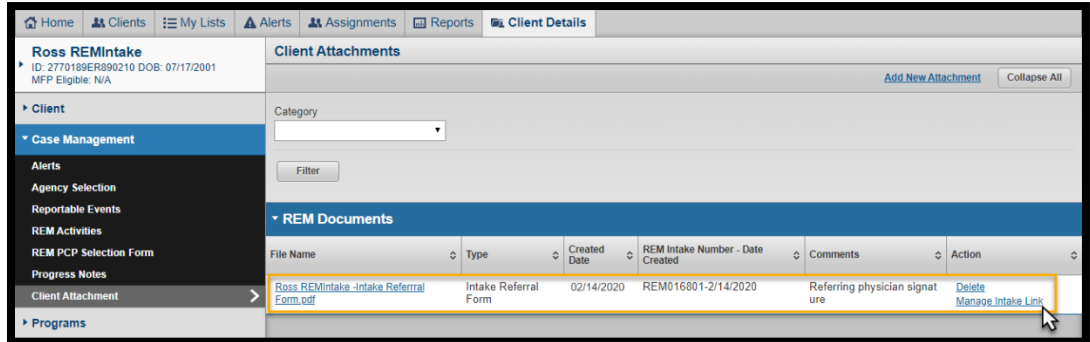


Figure 28-Manage Intake Links

- The **Manage Link to REM Intake** dialog box displays, select the check box for the REM Intake Referral that needs to be linked or unlinked.

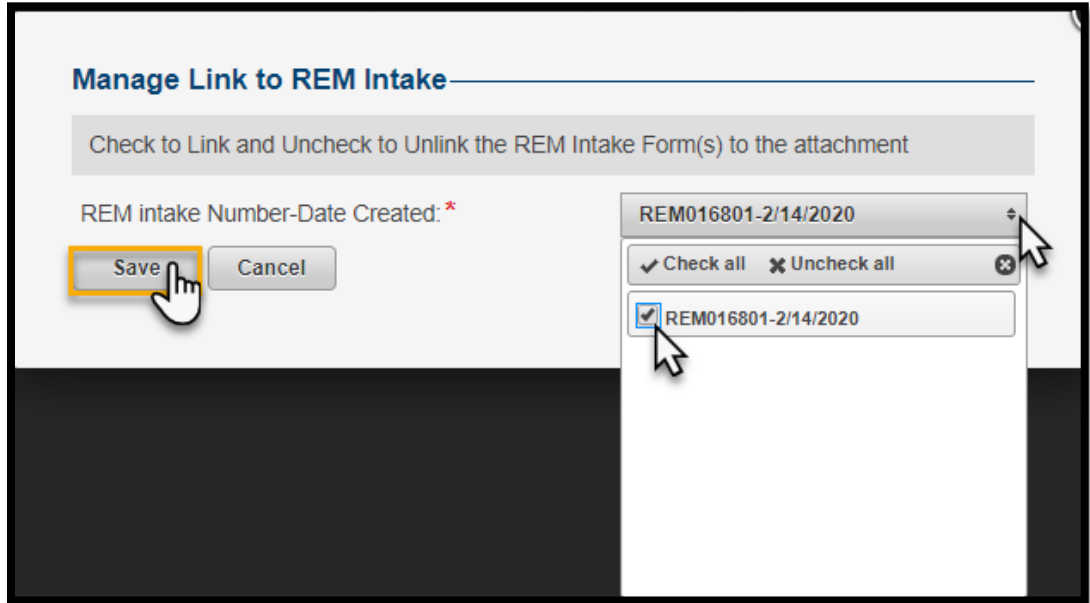


Figure 29-Save Manage Link to REM Intake

- Linked Attachment will appear in the respective REM Intake Referral – Attachments.
- Navigate back to the REM Intake Referral Summary and expand the Attachments section to view the linked REM Intake Referral Form document attachment.

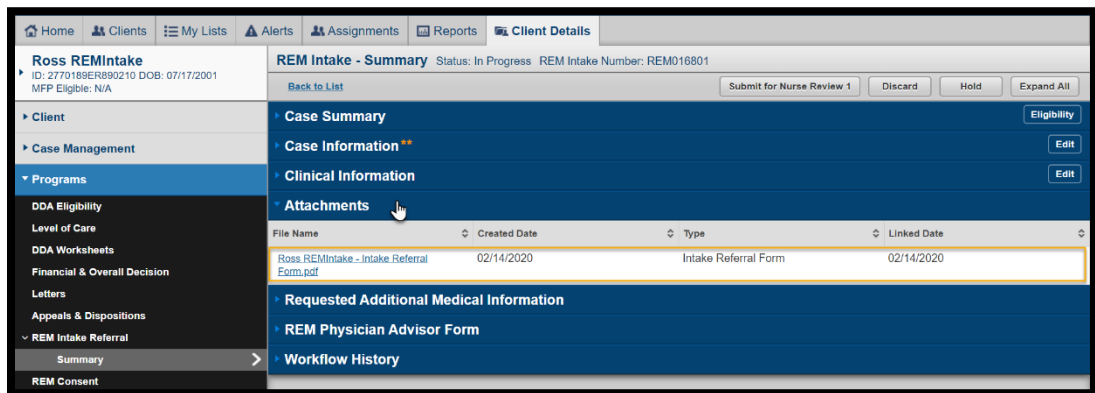


Figure 30-View REM Intake Attachments

4.2 Submit REM Intake Referral Form

The REM Intake Referral Form can be submitted once the REM Intake Case Information and Clinical Information is completed with all the required information.

Use the following steps to submit the REM Intake Referral for Nurse Review 1:

1. Click **Submit for Nurse Review 1** on top right of the REM Intake Referral Summary page.

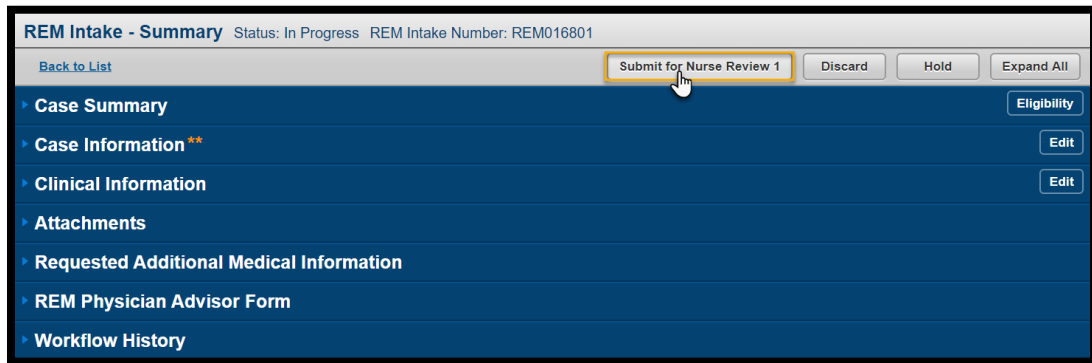


Figure 31-Submit for Nurse Review 1

2. The REM Intake Summary displays Success Message and the updated status “**Pending Nurse Review 1**”

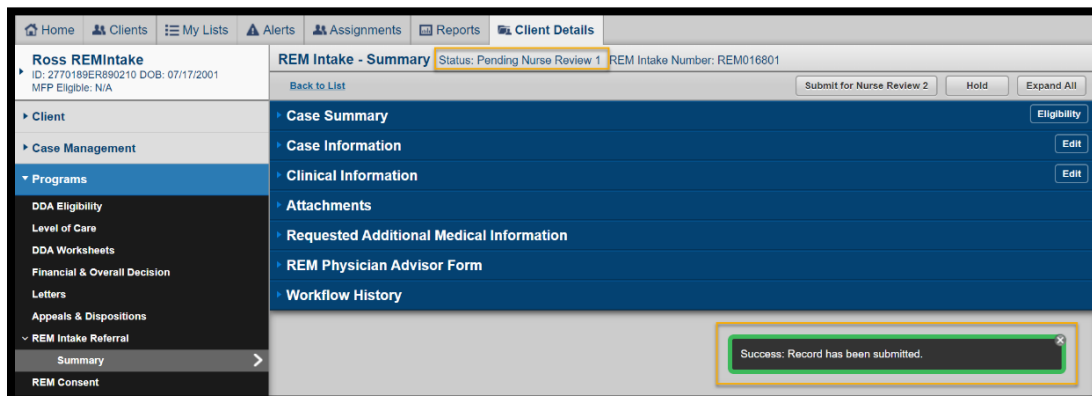


Figure 32-Pending Nurse Review 1 Status

4.2.1 Nurse Review 1

Anyone with the user role “MDH REM Intake Nurse” will receive an **Alert** indicating the REM Intake Referral Form is ready for Nurse Review 1.

1. Click the **Alerts Tab**, use the filter options if needed and Click the hyperlink for **REM Intake form is ready for Nurse Review 1** to navigate to the REM Intake Summary.

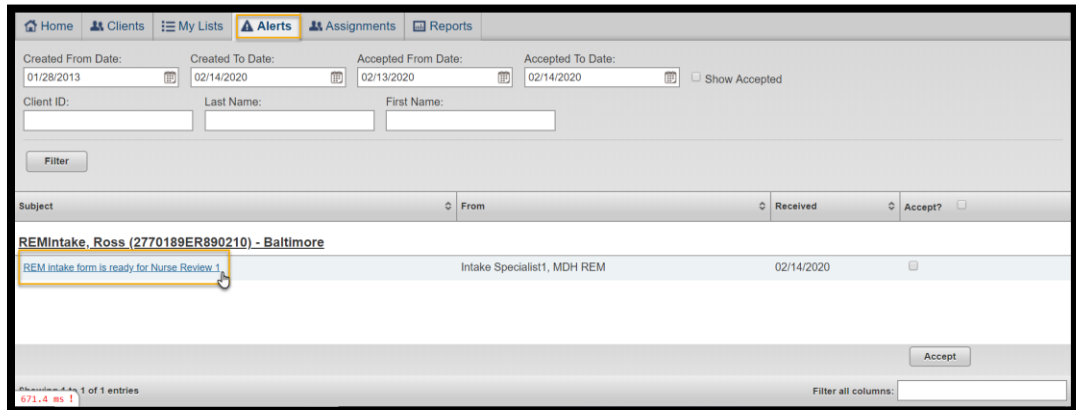


Figure 33-Nurse Review 1 Alerts: Alerts Tab

2. The REM Intake Summary displays the updated status “**Pending Nurse Review 1**”.

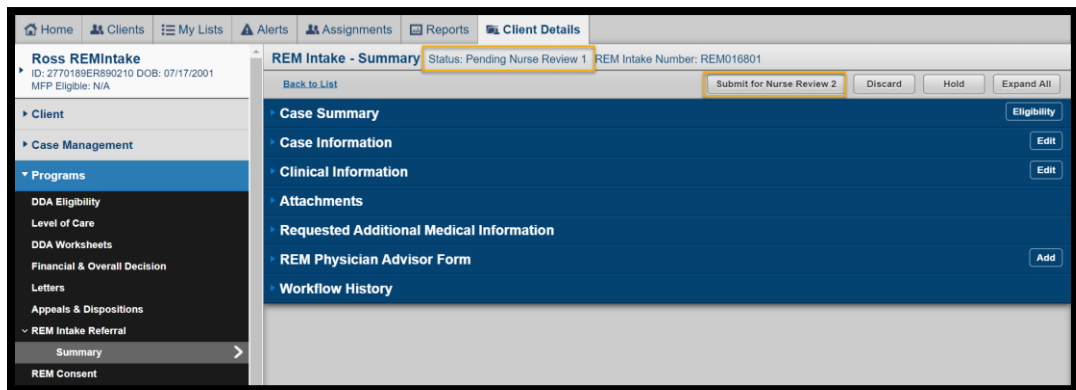


Figure 34-REM Intake Summary Status: Pending Nurse Review 1

3. The first Intake Nurse that reviews and updates the REM Intake Referral Form will be allowed to enter **Nurse Recommendation 1** to Approve, Deny or Other and submit the referral.

- 4. Review the form, make necessary updates and click **Submit for Nurse Review 2**.

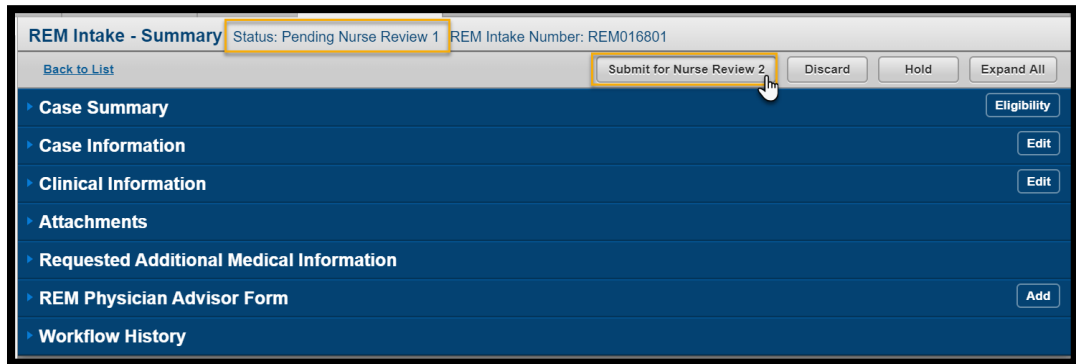


Figure 35-Submit for Nurse Review 2

- 5. Select **Nurse Recommendation 1**: Approve, Deny, Other.

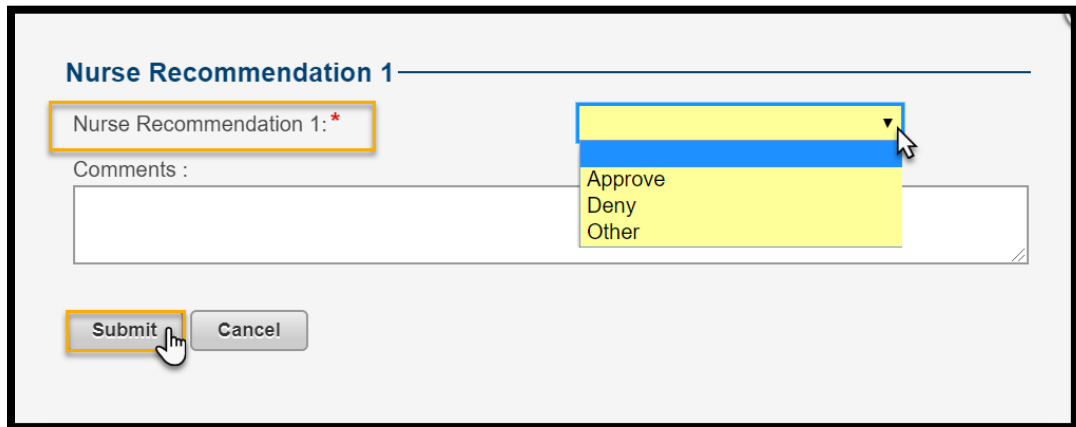


Figure 36-Nurse Recommendation 1

- 6. Once the Nurse Review 1 is submitted successfully, the status is updated to **“Pending Nurse Review 2”**.

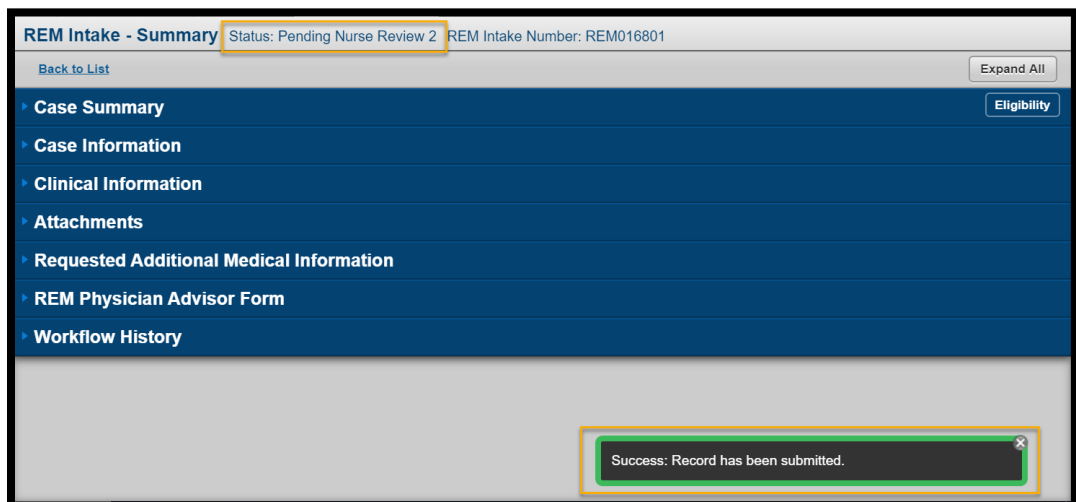


Figure 37-REM Intake Summary Status: Pending Nurse Review 2

4.2.2 Nurse Review 2

The **Pending Nurse Review 2** status flow works the same as **Pending Nurse Review 1** status.

All the Intake Nurses except for the one who submitted first review will receive an **Alert** to review. Alert Message: **REM Intake form is ready for Nurse Review 2**

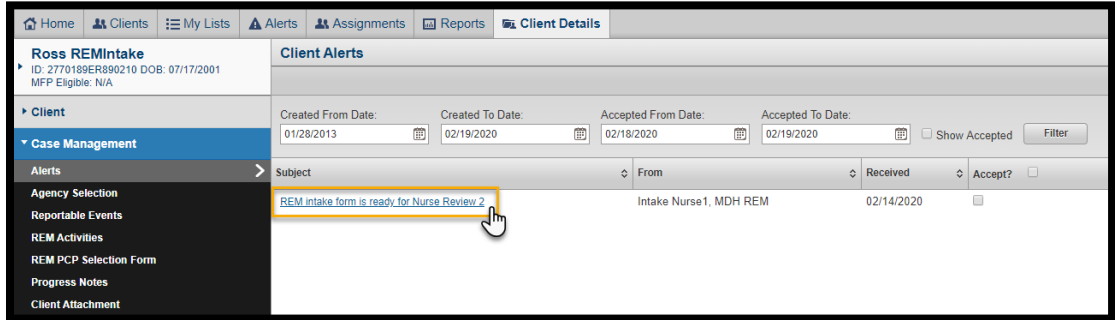


Figure 38-Nurse Review 2 Alert

1. Once the Nurse Review 2 is completed, the 2nd Intake Nurse must Click **Submit Review 2**.

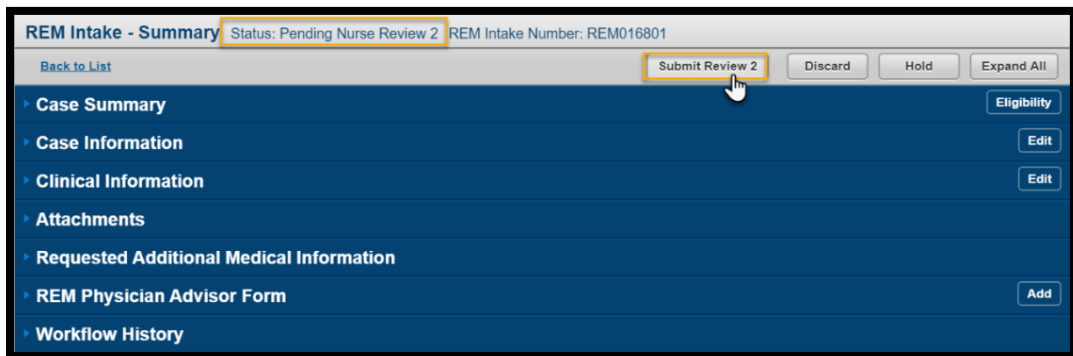


Figure 39-Submit Review 2

2. Select **Nurse Recommendation 2**: Approve, Deny, Other.

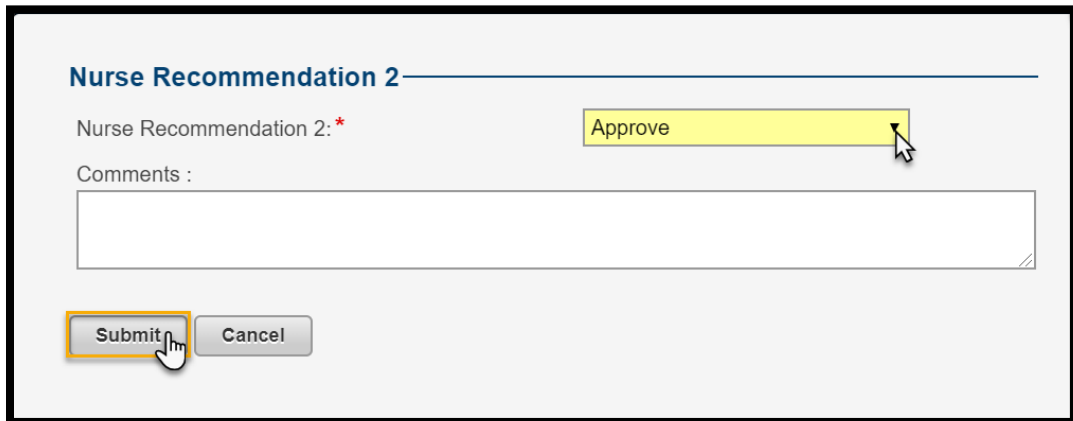


Figure 40-Nurse Recommendation 2

- Once the Nurse Review 2 is submitted successfully, the status is updated to **“Approved”**.

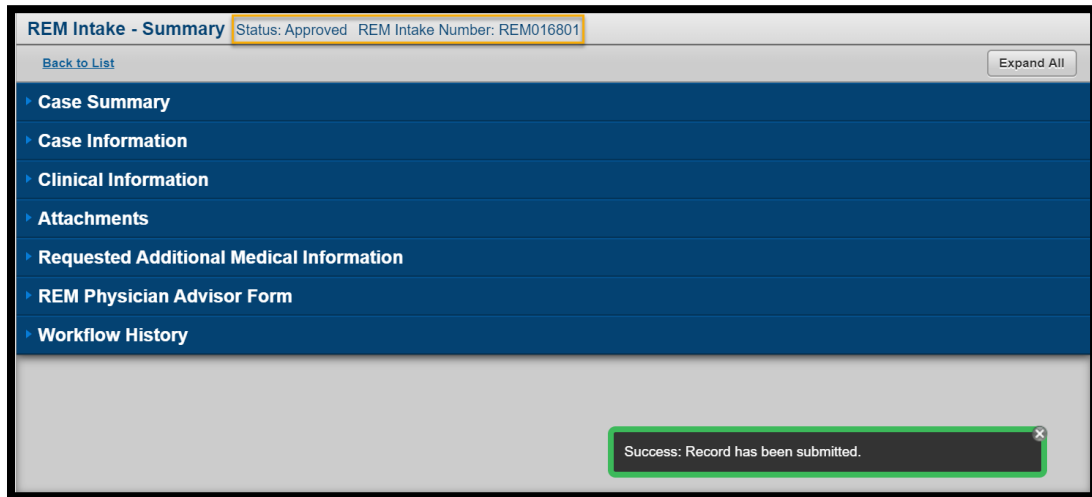


Figure 41-REM Intake Summary Status: Approved

4.3 REM Intake Referral Form Status Overview

The system validates the following conditions and updates the Status of the form accordingly:

Approved	<ul style="list-style-type: none"> • If the decisions of Nurse Recommendation 1 and Nurse Recommendation 2 both were “Approved”.
Denied	<ul style="list-style-type: none"> • If the decisions of Nurse Recommendation 1 and Nurse Recommendation 2 both were “Deny”.
Pending Final Decision	<ul style="list-style-type: none"> • If the decisions of Nurse Recommendation 1 and Nurse Recommendation 2 do not match. • If any of the Recommendations - “Nurse Recommendation 1” or “Nurse Recommendation 2” is marked as other.
Pending Additional Medical Information	<ul style="list-style-type: none"> • If the Intake Nurse generates a Request for Additional Medical information letter.
Pending Physician Advisor Review	<ul style="list-style-type: none"> • If the Intake Nurse added and submitted the REM Physician Advisor form.

Figure 42-REM Intake Status Overview

4.3.1 Request for Additional Medical Information

Once the REM Intake Referral Form is “Pending Nurse Review 1”, “Pending Nurse Review 2”, or “Pending Final Decision”, the Intake Nurse could generate the Request for Additional Medical Information Letter if needed. The status of the REM Intake Referral Form is updated to “Pending Additional Medical Information.”

The Request for Additional Medical Information Letter is sent to medical providers requesting supplemental information needed for the REM Intake Unit to make a REM eligibility determination.

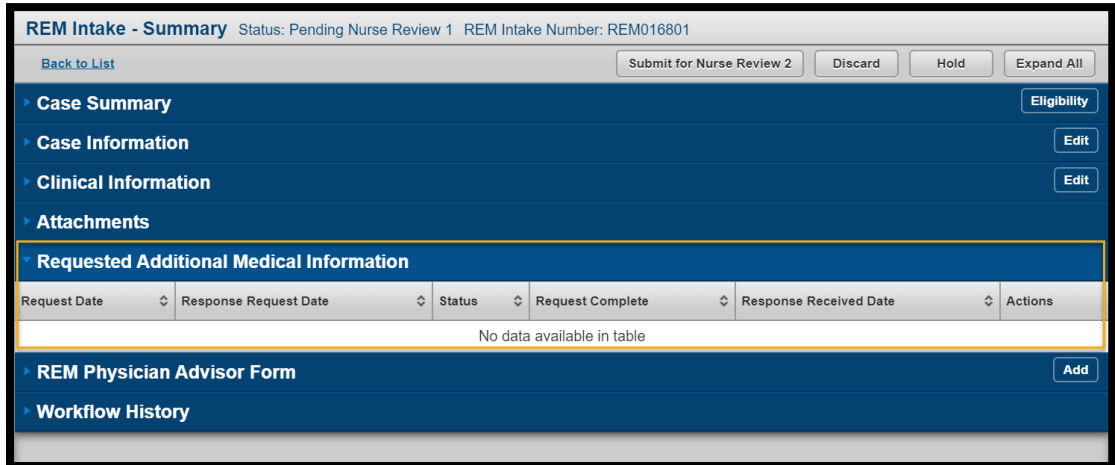


Figure 43-Requested Additional Information Section

Use the following steps to Create a Request for Additional Medical Information Letter for the REM Intake Referral:

1. From the left navigation pane under the **Programs** banner click on **Client Attachment**.
2. Click on **Manage** displayed on the **REM Letters** banner.

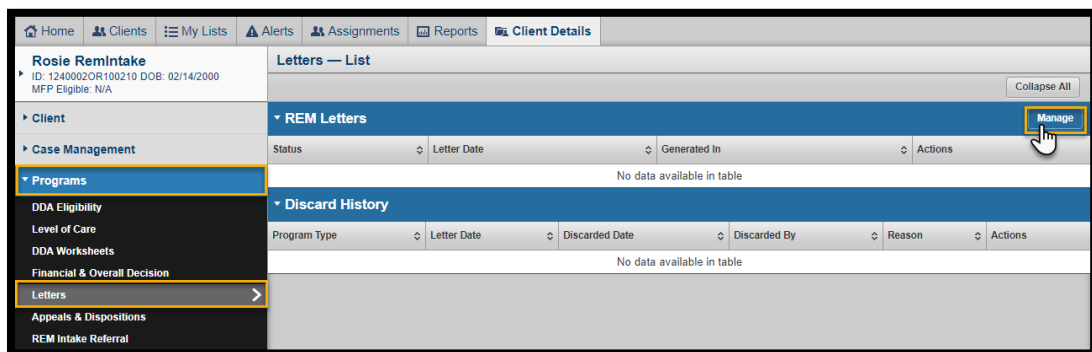


Figure 44-Manage REM Letter

3. Select the letter type, Request for Additional Medical Information from the **Create New Letter** field.

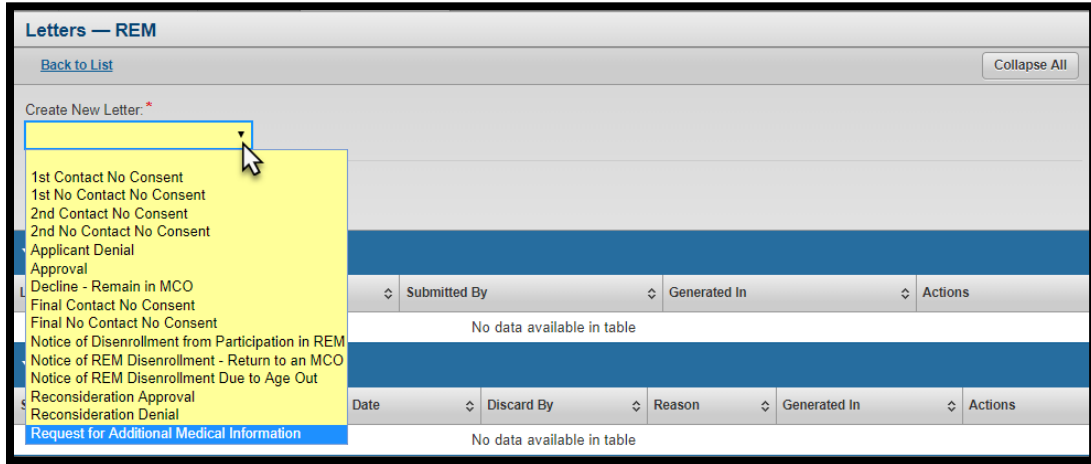


Figure 45-Select REM Letter

4. Click **Create** to navigate to the Request for Additional Medical Information Letter page.

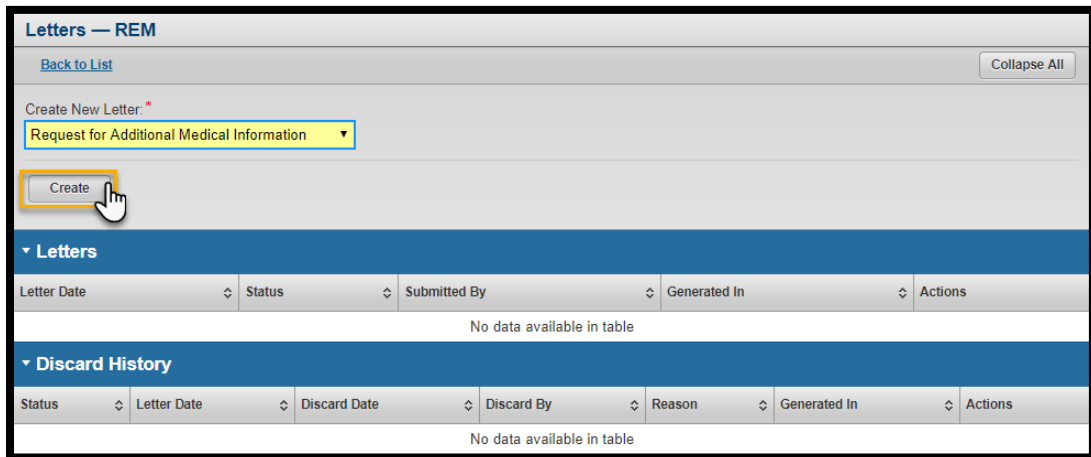


Figure 46-Create REM Letter: Request for Additional Medical Information

- 5. Complete the information for the Additional Medical Information Request and click **Submit**.

REM Additional Medical Information Request Letter - MDH Letter

Cancel New **Submit**

REM Additional Medical Information Request Letter Form

Rare and Expensive Case Management
Additional Medical Information Request

To: Referring Physician ABRAHAM A GENUT M D

From: **Maryland Department of Health REM Intake Unit**

Re: REM Applicant's Name: Rosie RemIntake MA#: N/A
DOB: 02/14/2000 Date Referral Received: 02/19/2020

February 20, 2020

The Intake Unit for Maryland's Rare and Expensive Case Management (REM) program received a referral on the above named Maryland Medicaid recipient. To be eligible for participation in the REM program, several regulatory requirements must be met. One of these requirements is that the applicant meets specific REM diagnosis criteria (COMAR 10.09.69.01B and O).

A review of the REM application submitted on Rosie RemIntake's behalf, however, results in the decision that additional medical information is needed to determine his/her REM eligibility. I am, therefore, requesting you to forward the following information for consideration in the eligibility process:

History and Physical within past year Radiology reports supporting the REM diagnosis
 Lab reports supporting the REM diagnosis A specialist consultation note supporting the REM diagnosis
 Other

Please send the requested information via fax or mail to:

REM Intake Unit
Maryland Department of Health (MDH)
201 W. Preston Street, Room 210
Baltimore, MD 21201
410-333-5426 - Fax

Please note this information must be received in our office by 02/28/2020. Failure to submit the requested information will result in the denial of the REM application. The basis of the denial will be the lack of sufficient information to confirm the REM applicant's medical condition meets the REM diagnosis criteria as required in COMAR 10.09.69.01B and O.

If you have any questions regarding this request, please call the REM Intake Unit at 1-800-565-8190. We will contact you if additional information is still needed. Thank you for your cooperation.

Requested By,
MDH REM Intake Nurse1
Intake Nurse

Figure 47--Submit Request for Additional Medical Information Letter

- The Request for Additional Medical Information letter is generated.

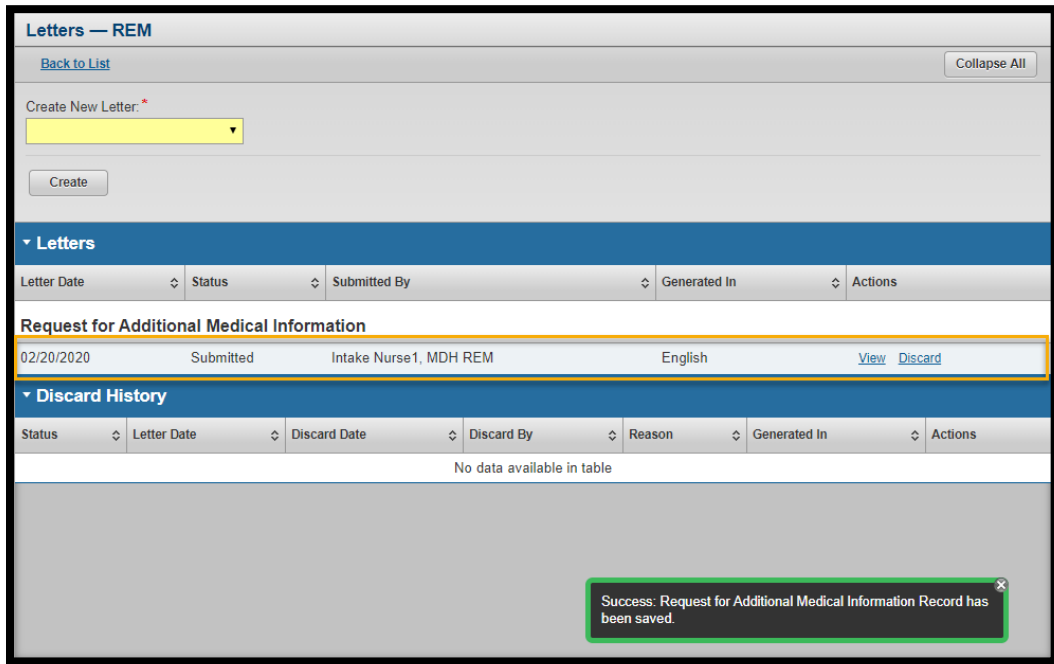


Figure 48-View Saved REM Letter

- The status of REM Intake Referral Form updates to “**Pending Additional Medical Information**”. Once the letter is received back with the requested medical information, select **Edit** to update the form.

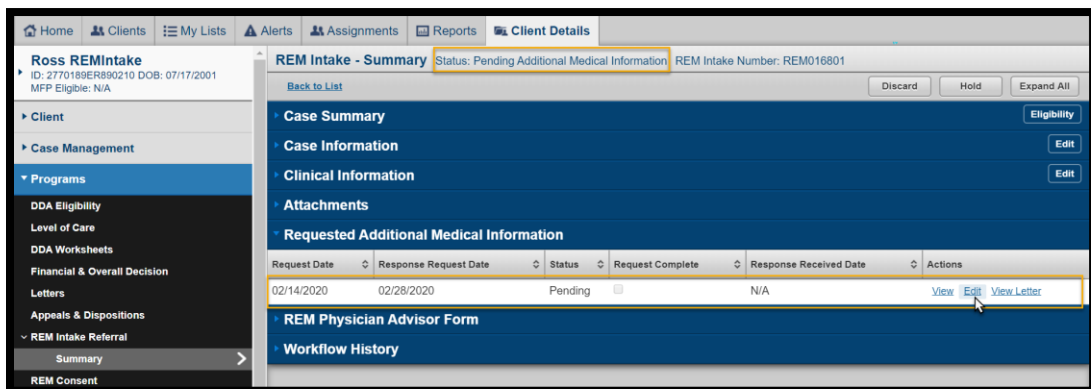


Figure 49-REM Intake Status: Pending Additional Medical Information

- Complete the form by selecting the appropriate check boxes and dates, and click **Save**

NOTE: System pre-populates the Response Information section with only the information that was indicated on the letter.

The screenshot shows a web form titled "Additional Medical Information" with a status of "In Progress". At the top right, there are "View" and "Edit" buttons, and a "Save" button is highlighted with a yellow box and a mouse cursor. Below the title bar, there is a "Cancel" link. The main content area is divided into two sections: "Request Information" and "Response Information". Under "Request Information", there are two date fields: "Request Date" (02/14/2020) and "Response Request Date" (02/28/2020). The "Response Information" section contains a "Response Received For Requested Information" section with two checked checkboxes: "History and Physical within past year" and "Lab reports supporting the REM diagnosis". To the right, there are two "Response Received Date" fields, both containing "02/14/2020". Below this, there is an unchecked checkbox "Additional information is no longer needed" and a checked checkbox "Request Complete", which is also highlighted with a yellow box. At the bottom, there is a "Note:" field.

Figure 50-Complete and Save Additional Medical Information

- Once the Additional Medical Information is successfully saved, click **Submit** to update the form status.

NOTE: If you have paper document, scan and save it to your local desktop or computer to find them in the browse list and upload the additional information received.

This screenshot shows the same "Additional Medical Information" form after the "Save" action. The "Submit" button at the top right is now highlighted with a yellow box and a mouse cursor. The form content is identical to the previous screenshot, but the "Request Complete" checkbox is now checked. A green success message box at the bottom right reads "Success: Record has been saved." The "View" and "Edit" buttons are still present at the top right, and a "Back to Summary" link is now visible at the top left.

Figure 51-Submit Additional Medical Information

NOTE: Once the requested information is received, capture the response received date.

IMPORTANT: To submit this form user must select “Request Complete” and if information is no longer needed or not received select “Additional Information is no longer needed” and “Request Complete.”

- Once the Requested Additional Medical Information is submitted successfully, the status is updated to the previous status of Nurse Review 1 or Nurse Review 2.

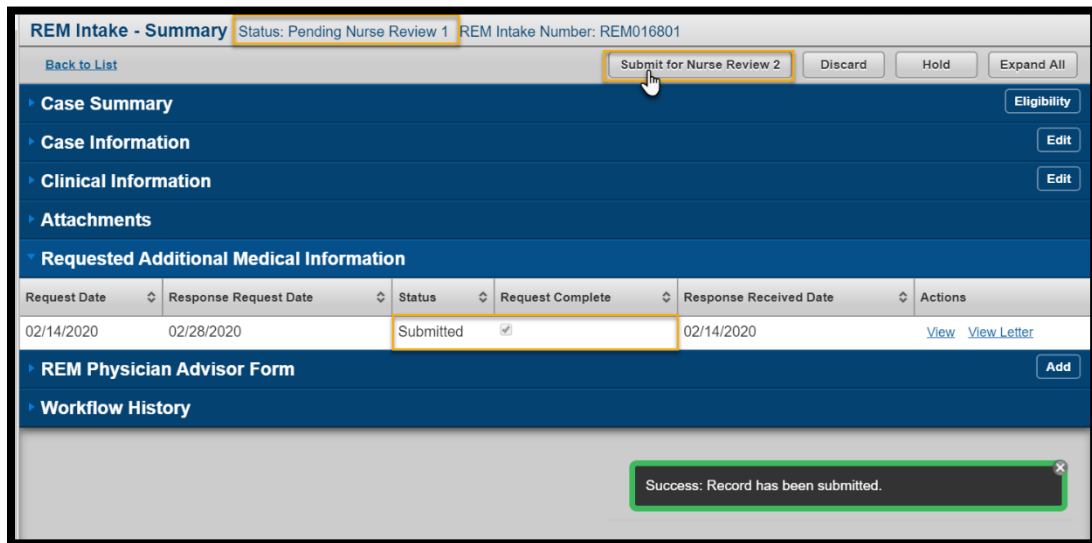


Figure 52-Submit for Nurse Review 2

4.3.2 REM Physician Advisor Form

Once the REM Intake Referral Form is in either “Pending Nurse Review 1”, “Pending Nurse Review 2” or “Pending Final Decision” status, the Intake Nurse can add a request for Physician Advisor Review if needed. The status of the REM Intake Referral Form will then be updated to “Pending Physician Advisor Review”.

Use the following steps to Add a Request for REM Physician Advisor Review:

- Click Add on the REM Physician Advisor Form section.

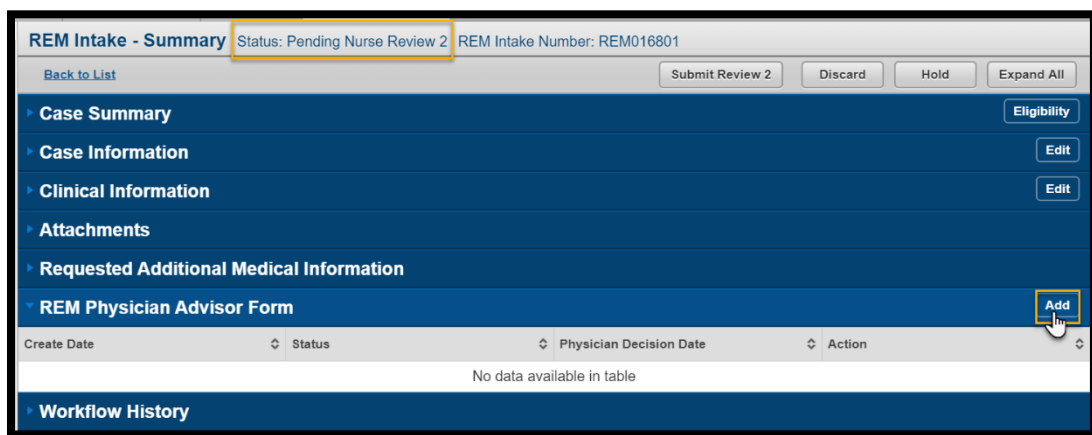


Figure 53-Add REM Physician Advisor Form

- 2. Enter the reason for request, select the response by date and click **Submit**.

I.Request for Physician Advisor Review: _____

Reason for Requesting Physician Advisor Review: **

Expert analysis

Physician Response by: **

02/28/2020

Submit Cancel

Figure 54-Submit REM Physician Advisor Form

- 3. The status of the REM intake will then be updated to “Pending Physician Advisor Review”.

REM Intake - Summary Status: Pending Physician Advisor REM Intake Number: REM016801

Back to List Expand All

- Case Summary Eligibility
- Case Information
- Clinical Information
- Attachments
- Requested Additional Medical Information
- REM Physician Advisor Form

Create Date	Status	Physician Decision Date	Action
02/14/2020	Pending Physician Advisor Review	N/A	View Print

Workflow History

Success: Record has been saved.

Figure 55-REM Intake Summary Status: Pending Physician Advisor Review

- 4. The **MDH REM Physician Advisor** will receive an **Alert** for the Physician Advisor Form and can select the hyperlink to navigate to the form.

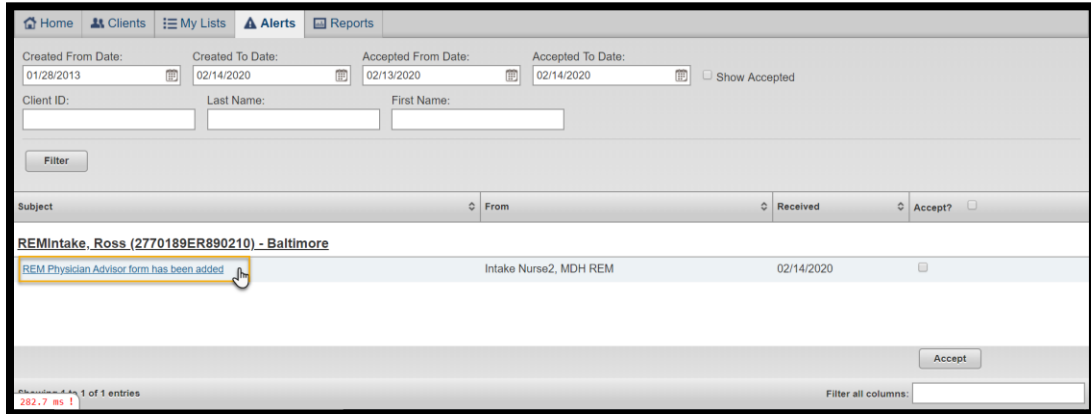


Figure 56-Physician Advisor Review Alert

- 5. The Physician must click **Edit** to complete the form.

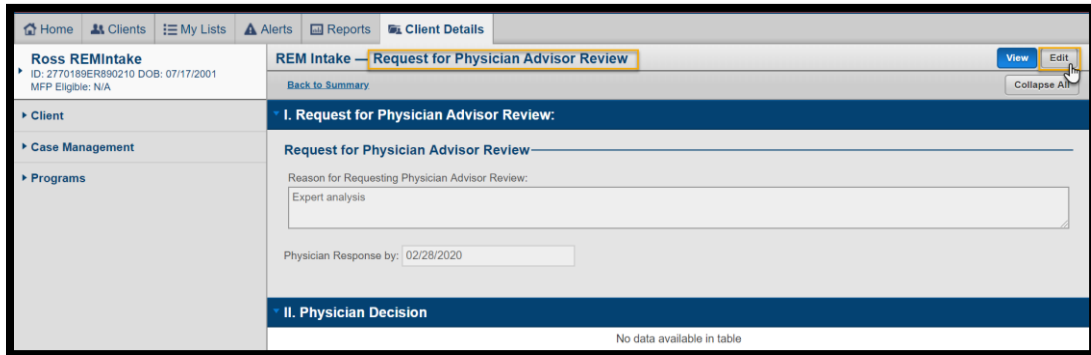


Figure 57-Edit Request for Physician Advisor Review Form

6. REM Physician Advisor will be required to complete the following fields:

Figure 58-Physician Advisor Search REM Qualifying Diagnosis

- Select a Physician Recommendation:
 - **Approve:** If the review is complete and you are ready to approve
 - **Deny:** If the review is complete and you are ready to Deny.
 - **Insufficient Documentation:** If there is any additional documentation needed to make a decision.
- Enter rationale for your recommendation in “Physician Advisor’s reason(s) for recommendation” field.
- Select a date when you made your decision in Physician Decision Date field.
- If You have selected Approve, system will require you to select a REM Qualifying diagnosis.

7. Enter the search criteria and click **Search** to view the results and click the **Select** hyperlink to select the REM Qualifying Diagnosis.

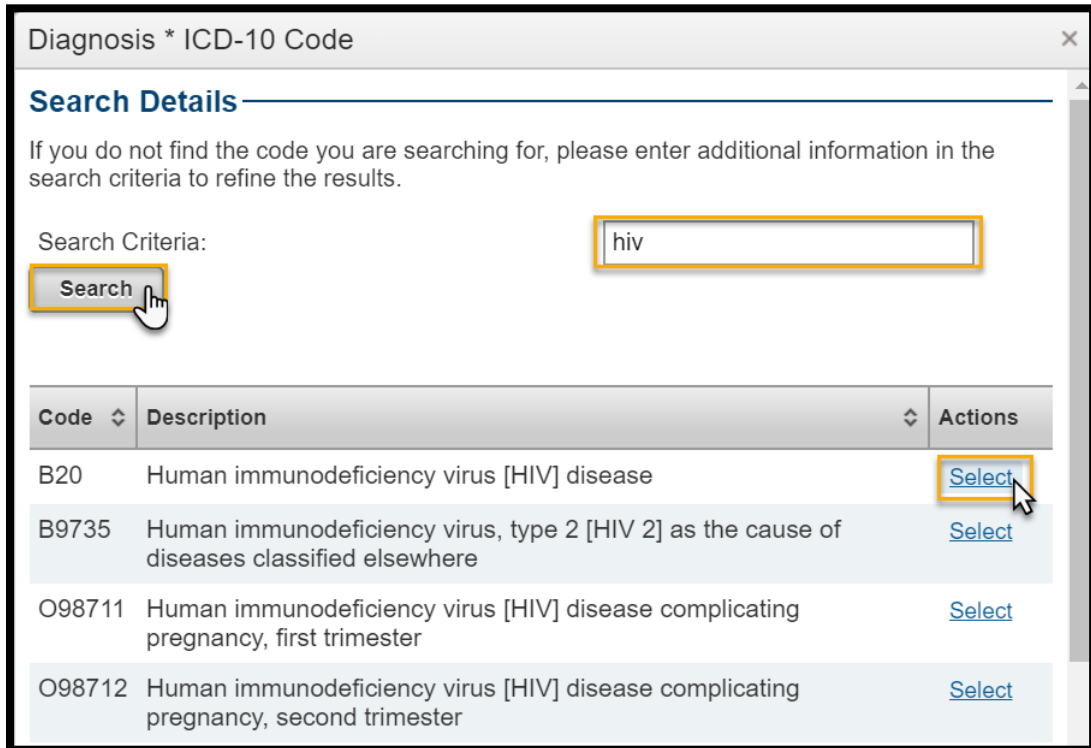


Figure 59-Search and Select REM Qualifying Diagnosis

8. Additional REM Diagnoses can be added if needed. Select and enter the required fields and **Save** the form.

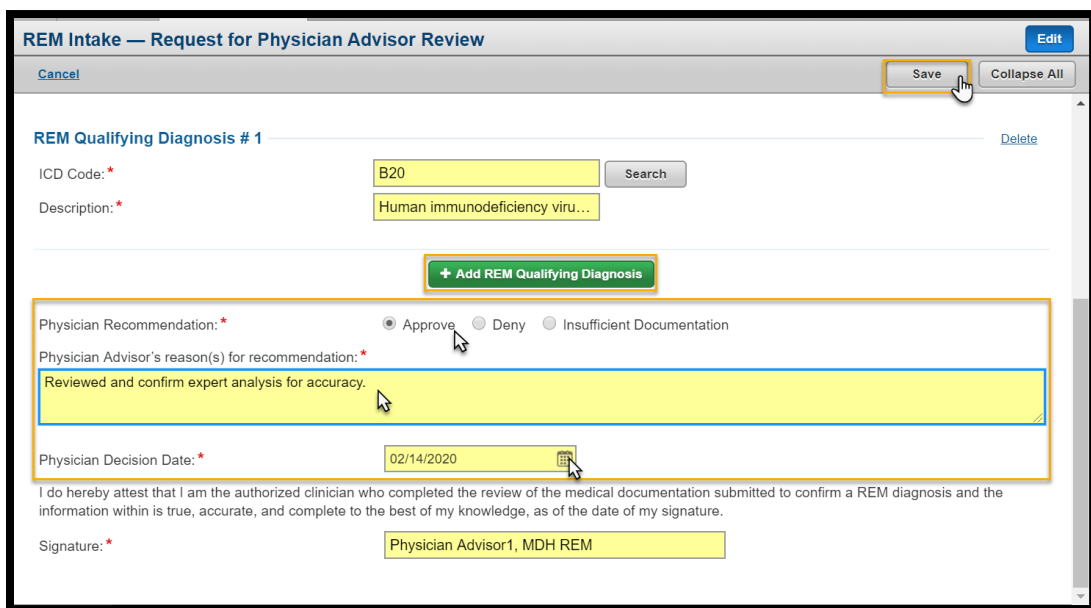


Figure 60-Save Request for Physician Advisor Review Form

- 9. Click **Submit** in order to send the referral for Intake Nurse Review.

The screenshot shows a web form titled "REM Intake — Request for Physician Advisor Review". At the top right, there are buttons for "View", "Edit", "Submit", and "Collapse All". The "Submit" button is highlighted with a yellow box. Below the title, there is a "Back to Summary" link. The form is divided into two main sections: "I. Request for Physician Advisor Review:" and "II. Physician Decision". Under section I, there is a text area for "Reason for Requesting Physician Advisor Review:" containing the text "Expert analysis", and a date field for "Physician Response by:" with the value "02/28/2020". Under section II, there is a "Details" section with a "REM Qualifying Diagnosis # 1" section. This section includes fields for "ICD Code:" (value: "B20") and "Description:" (value: "Human immunodeficiency viru..."). At the bottom, there are radio buttons for "Physician Recommendation:" with options "Approve", "Deny", and "Insufficient Documentation". A success message "Success: Record has been saved." is displayed in a green box at the bottom right.

Figure 61-Submit Request for Physician Advisor Review Form

- 10. The status is updated to the previous Pending Nurse Review 1 or Pending Nurse Review 2 status.

The screenshot shows a web application interface for "REM Intake - Summary". The top navigation bar includes "Home", "Clients", "My Lists", "Alerts", "Reports", and "Client Details". The main content area shows "REM Intake - Summary" with a status of "Pending Nurse Review 2" and "REM Intake Number: REM016801". There is a "Back to List" link and an "Expand All" button. The left sidebar is expanded to show "Programs" with sub-items: "DDA Eligibility", "Level of Care", "DDA Worksheets", "Letters", "Appeals & Dispositions", "REM Intake Referral", "Summary", and "REM Assessment". The main content area lists several sections: "Case Summary", "Case Information", "Clinical Information", "Attachments", "Requested Additional Medical Information", "REM Physician Advisor Form", and "Workflow History". An "Eligibility" button is visible in the top right of the main content area.

Figure 62-REM Intake Summary Status Updated to Previous Pending

- An **Alert** will be sent to the MDH REM Intake Nurse for **REM Physician Advisor** has made a decision of **Approve**.

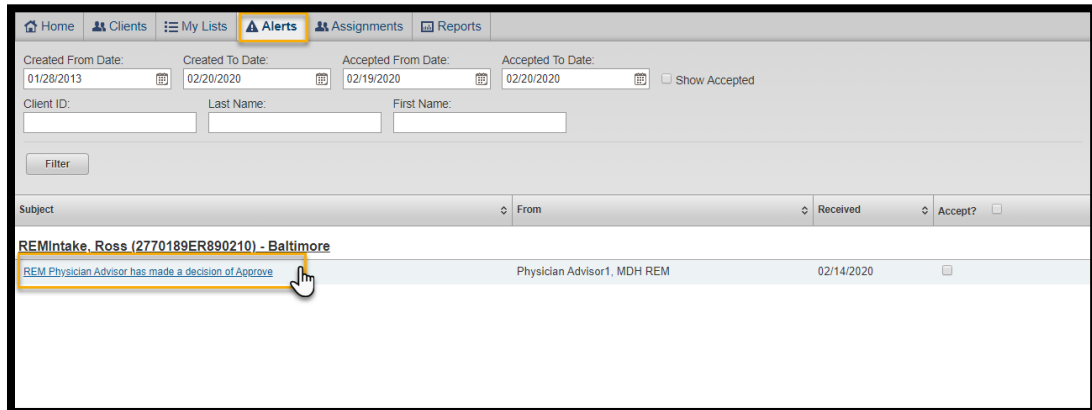


Figure 63-Alert for Physician Advisor Decision

- The status is updated to the previous status. Click the **REM Physician Advisor Form** banner to **View** or **Print** the details.

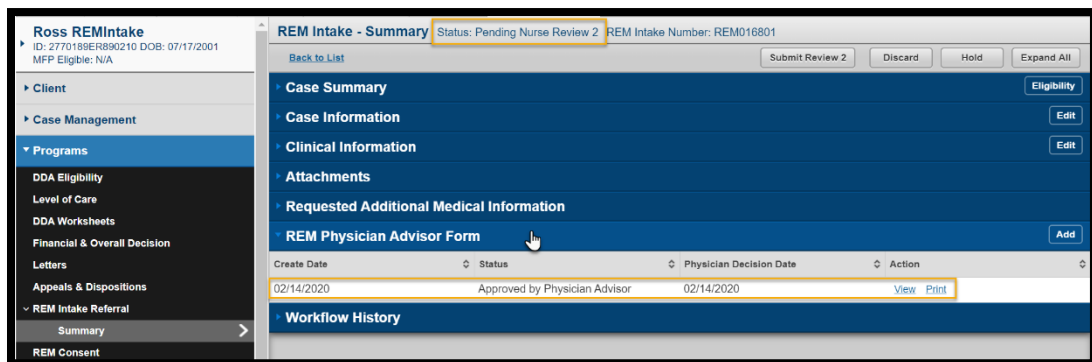


Figure 64-View Completed Physician Advisor Form

1.3 REM Reconsideration

A denied REM Intake Referral can be reconsidered based on the Client’s request.

- Reconsideration link will be available for the Denied and Active REM Intake Referral
- A Client can request for reconsideration within the first 30 days from the denial.
- This link will only be available for the first 30 days of the denial.
- Upon use it will create a new REM Intake Form with type “Reconsideration.”

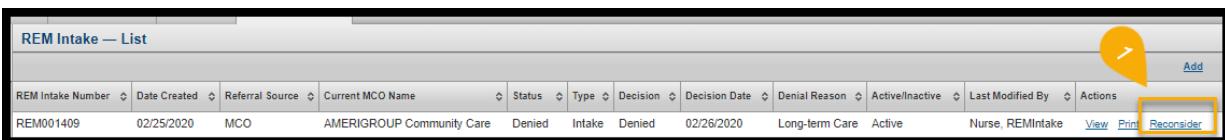


Figure 65-REM Reconsideration

1.4 Workflow History

The Workflow History displays the various steps in the REM Intake Referral process with the timestamp of each step.

Click the Workflow History blue banner to expand and view the REM Intake Referral workflow.

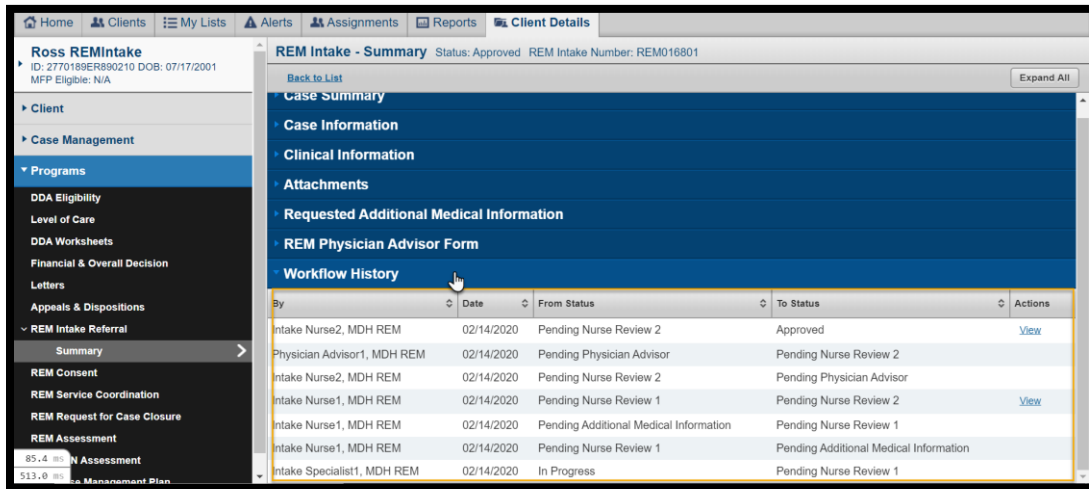


Figure 66-View REM Intake Workflow History

5 REM Consent Form

The Maryland Department of Health (MDH) uses the Rare and Expensive Case Management (REM) Consent Form to document the Client’s agreement to enroll in the REM program. If the Client receives services through an MCO, supplies, or equipment that require coordination the REM enrollment may be delayed without an approved REM Consent Form.

5.1 Create REM Consent Form

The REM Consent Form is required before a Client can be enrolled in a REM program. The submission of the REM Consent Form with the Client’s consent begins the next step of enrollment. If the Client has been receiving services from MCO then upon submission of this form system will auto-generate a Service Coordination Form. Client will also be assigned to a Case Management and a Case manager if the client has agreed to enroll in REM.

5.1.1 Primary Actors

The actors authorized to complete a REM Consent Form include:

Department	Roles
MDH	REM Intake Nurse, REM Administrator

Table 5-Create REM Consent Form - Primary Actors

5.1.2 REM Consent Form Workflow

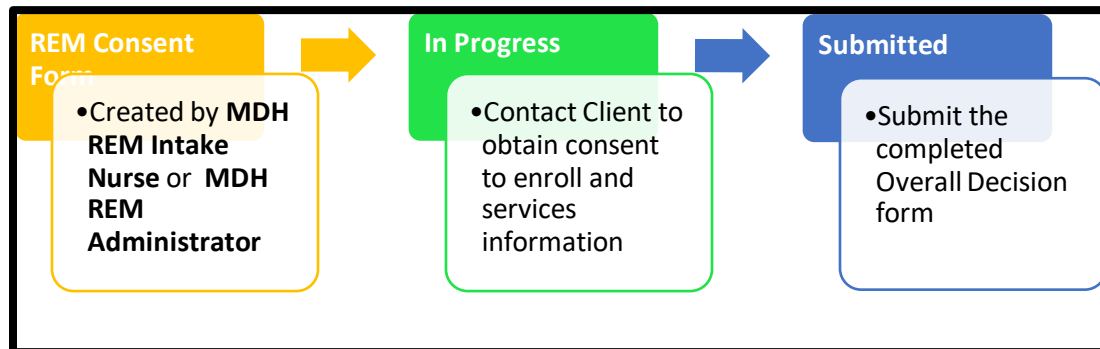


Figure 67- REM Consent Form Workflow

5.1.3 Add REM Consent Form

A REM Consent Form can be created for a Client who has an “Active” and “Approved” REM Intake Referral Form.

Use the following steps to add a REM Consent Form:

1. From the Client Details tab, select the **Programs** banner on the left navigation pane.
2. Select **REM Consent**.
3. Select **Add** hyperlink.

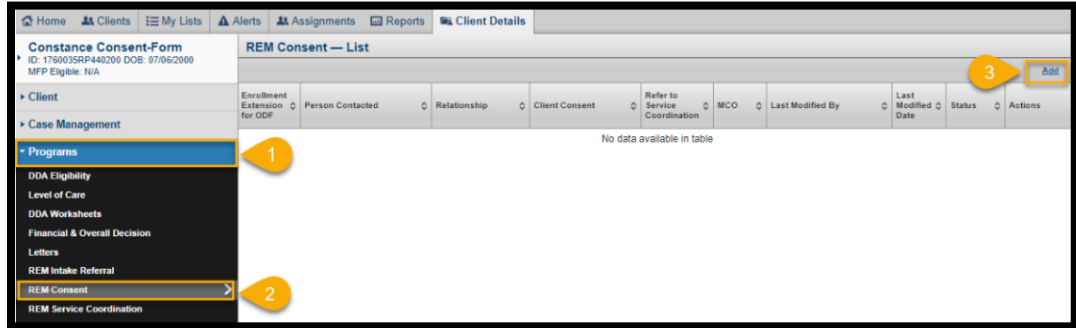


Figure 68-Add REM Consent Form

4. Enter details into the REM Consent Form fields.

5. Click **Save** to save the form

REM Consent New

[Cancel](#) Save

REM Consent Form

Consent Information

Enrollment Extension for the existing Overall Decision Form

Person Contacted: **

Relationship:

Date Contacted: **

Interpreter services used?

Consent to enroll in REM? **

Overview of REM Case Management provided? **

Supplies **

<input type="checkbox"/> Diapers	<input type="checkbox"/> Suction Catheters
<input type="checkbox"/> Feeding Supplies	<input type="checkbox"/> Tracheostomy Supplies
<input type="checkbox"/> GT/NG tube	<input type="checkbox"/> Urinary Catheters
<input type="checkbox"/> Incontinent Supplies	<input type="checkbox"/> Wound Care Supplies
<input type="checkbox"/> Ostomy Supplies	<input type="checkbox"/> Other
<input type="checkbox"/> Oxygen/Oxygen Supplies	<input checked="" type="checkbox"/> None

Equipment **

<input type="checkbox"/> AFOs/Splints	<input checked="" type="checkbox"/> Stander
<input type="checkbox"/> Bath Chair	<input type="checkbox"/> Stroller
<input type="checkbox"/> Chest Vest	<input type="checkbox"/> Walker
<input type="checkbox"/> Cough Assist	<input type="checkbox"/> Ventilator
<input type="checkbox"/> Feeding Pump	<input type="checkbox"/> Wheelchair
<input type="checkbox"/> Hospital Bed	<input type="checkbox"/> IV Pump
<input type="checkbox"/> Hoyer Lift	<input type="checkbox"/> Other
<input type="checkbox"/> Kid-Cart	<input type="checkbox"/> None

Specialty Pharmacy Services **

<input type="checkbox"/> Home infusion for medications requiring pre-authorization	<input type="checkbox"/> Other
<input type="checkbox"/> Specialty medications requiring pre-authorization	<input checked="" type="checkbox"/> None

Services **

<input type="checkbox"/> PDN/HHH/CNA/CMT	<input type="checkbox"/> Speech
<input type="checkbox"/> HH Nursing	<input type="checkbox"/> Transplant List
<input checked="" type="checkbox"/> PT	<input type="checkbox"/> Other
<input type="checkbox"/> OT	<input type="checkbox"/> None

Service Coordination Information

Refer for Service Coordination: **

MCO

Notes:

Figure 69-Saved REM Consent Form

NOTE: Fields denoted with double asterisk ** indicates the fields are required to submit form.

The saved REM Consent Form displays:

- The REM Consent Form in read-only or view mode
- Status is displayed at the top of the form
- **Back to List** hyperlink, located on the upper left of form
- **View, Edit** or **Submit** buttons, located in the upper right of form
- Success message box (green outline), located in the lower-right of form

NOTE: The form is not submitted until you click the **Submit** button

The screenshot displays the 'REM Consent' form with the following elements:

- Header:** 'REM Consent' with a 'Status: In Progress' indicator. Navigation buttons include 'Back to List', 'View', 'Edit', and 'Submit'.
- Consent Information:** A section with several fields:
 - Enrollment Extension for the existing Overall Decision Form:
 - Person Contacted: ** Self
 - Relationship: Self
 - Date Contacted: ** 12/22/2019
 - Interpreter services used? No
 - Consent to enroll in REM? ** Accepted
 - Overview of REM Case Management provided? ** Yes
- Supplies **:** A list of checkboxes for various supplies:
 - Diapers
 - Feeding Supplies
 - GT/NG tube
 - Incontinent Supplies
 - Ostomy Supplies
 - Oxygen/Oxygen Supplies
 - Suction Catheters
 - Tracheostomy Supplies
 - Urinary Catheters
 - Wound Care Supplies
 - Other
 - None (checked)
- Equipment **:** A list of checkboxes for various pieces of equipment:
 - AFOs/Splints
 - Bath Chair
 - Chest Vest
 - Cough Assist
 - Feeding Pump
 - Hospital Bed
 - Stander (checked)
 - Stroller
 - Walker
 - Ventilator
 - Wh...
 - IV Pump
- Success Message:** A green-bordered box at the bottom right contains the text: 'Success: Record has been saved.'

Figure 70-Program Type

6. Select **Back to List** hyperlink to navigate to the REM Consent Form List page. All work will be saved if you have pressed the **Save** button and received the success message box.

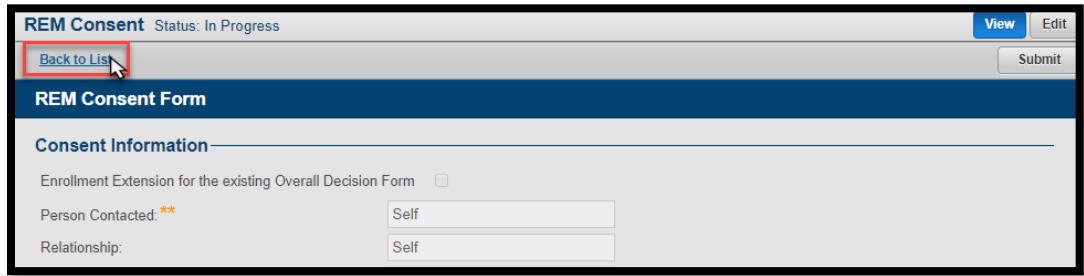


Figure 71-Back to List Hyperlink

7. The REM Consent Form List page displays all REM Consent Forms for the Client.

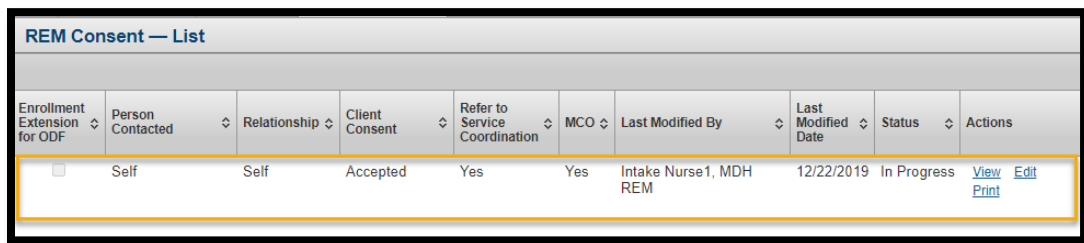


Figure 72-REM Consent Form List Page

5.1.4 Edit REM Consent Form

The REM Consent Form can be modified while the form is in “In progress” status. Use the following steps to edit a REM Consent Form:

1. From the Client Details tab, select the **Programs** banner on the left navigation pane
2. Select **REM Consent** to view the list of forms
3. Select the **Edit** hyperlink under the Actions column to open the form in edit mode

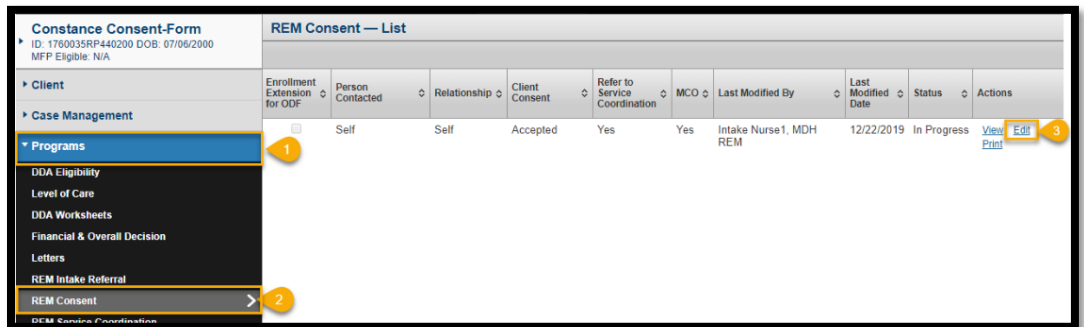


Figure 73-Edit REM Consent Form

- Modify the REM Consent Form during “In progress” status and click **Save**

NOTE: Use the **Cancel** hyperlink to ignore any changes, if needed.

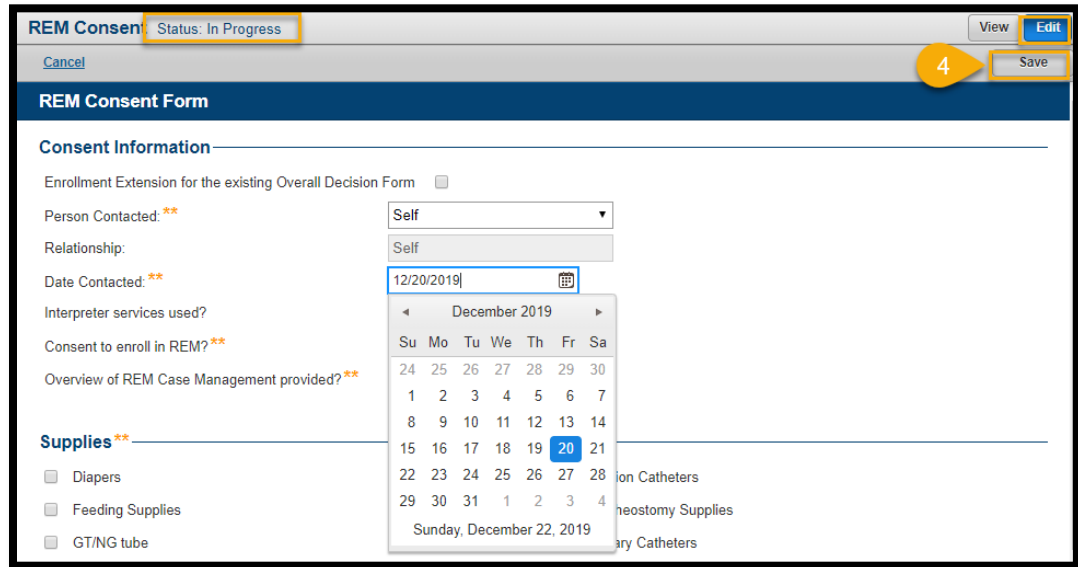


Figure 74-Save REM Consent Form

5.2 List/View REM Consent Form

5.2.1 Primary Actors

Department	Roles
MDH	MDH REM Intake Nurse, MDH REM Administrator, MDH REM Intake Specialist
CMA	CMA REM Administrator, CMA REM Supervisor, CMA REM Case Manager, CMA REM Intake Specialist Only applicable to the Client’s Assigned Case Management Agency (CMA)

Table 6-List/View REM Consent - Primary Actors

5.2.2 List / View Scenario

The REM Consent **List** displays all REM Consent Forms added, submitted, or discarded. The form provides options to view, edit and print. Only certain users can edit the form. Follow these steps to display the REM Consent List page:

- From the Client Details tab, select the **Programs** banner on the left navigation pane
- Select **REM Consent** to view the list of forms
- Select the **View** hyperlink under the Actions column to display the REM Consent Form in view (read-only) mode

NOTE: CMA staff will only be able to view the REM consent form; they cannot edit the form.

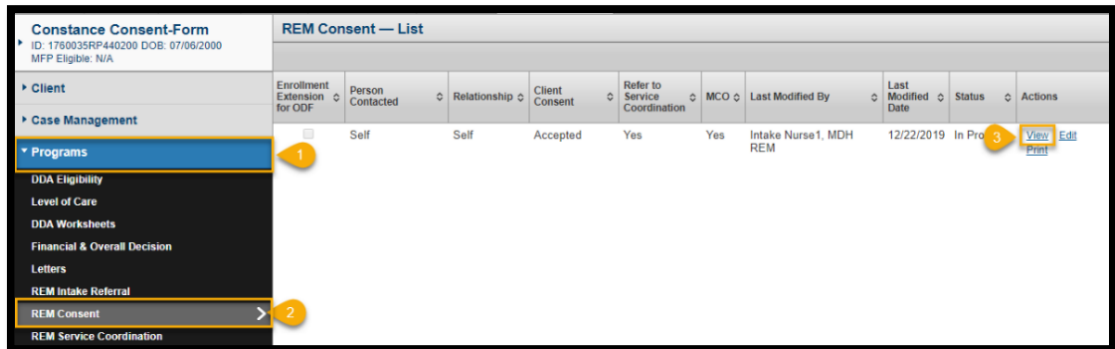


Figure 75-REM Consent Form List View

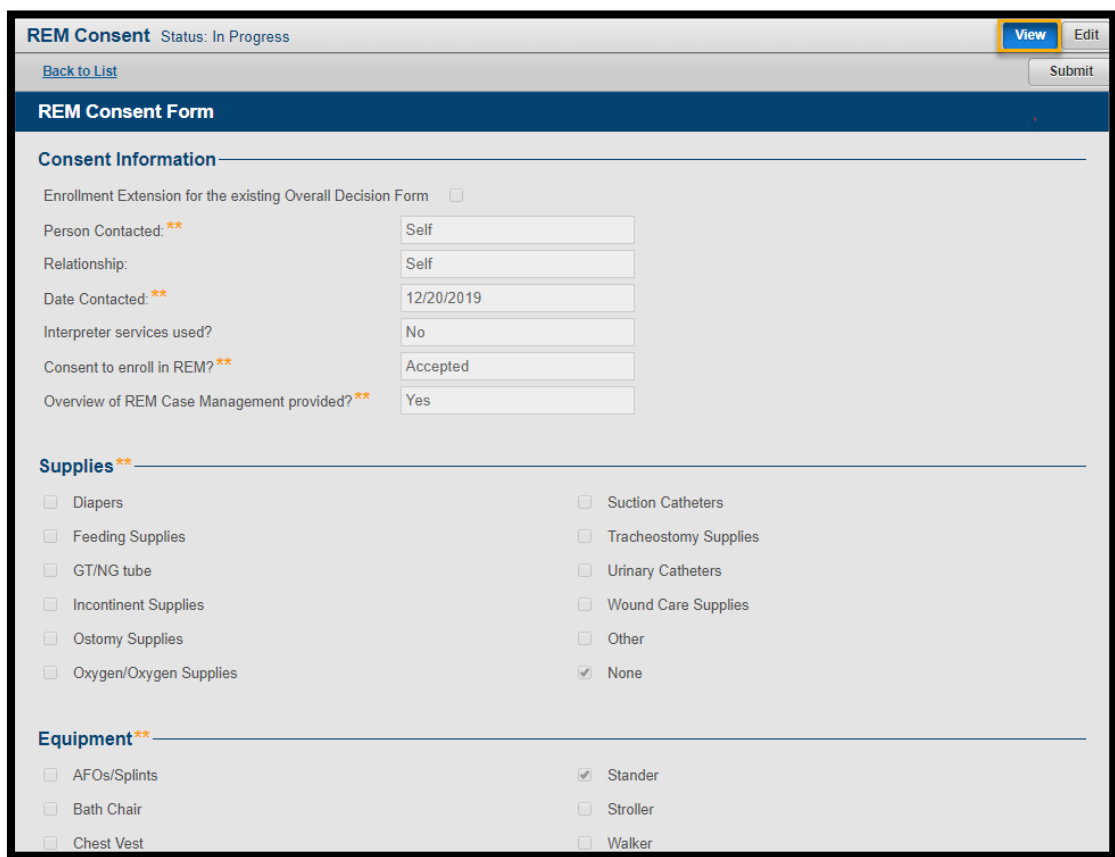


Figure 76-REM Consent Form View Read-Only Mode

5.3 Submit REM Consent Form

The REM Consent Form is ready for submission once reviewed for accuracy and successfully saved. The submission of the completed form begins the review process and automatically generates status notifications, or the Service Coordination Form, if required.

Use the following steps to submit the REM Consent Form:

1. From the Client Details tab, select the **Programs** banner on the left navigation pane

2. Select **REM Consent** to view the list of forms
3. Select the **View** hyperlink under the Actions column to display the REM Consent Form in view (read-only) mode

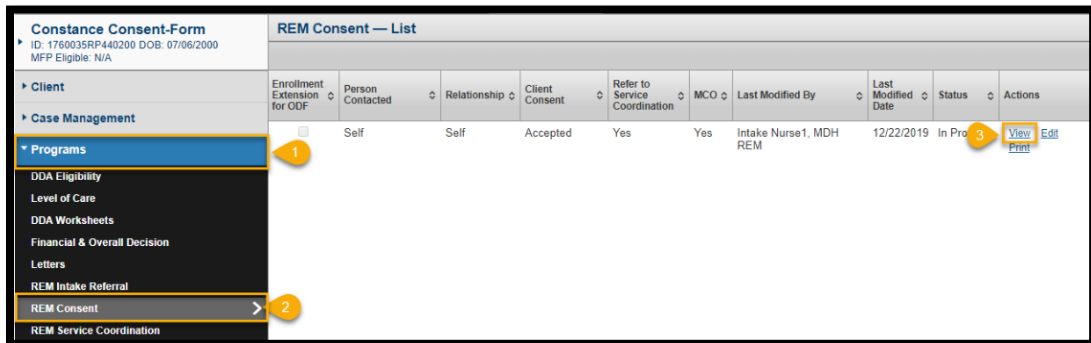


Figure 77--Submit REM Consent Form

4. Click **Submit** the submit button to submit the completed REM Consent Form.

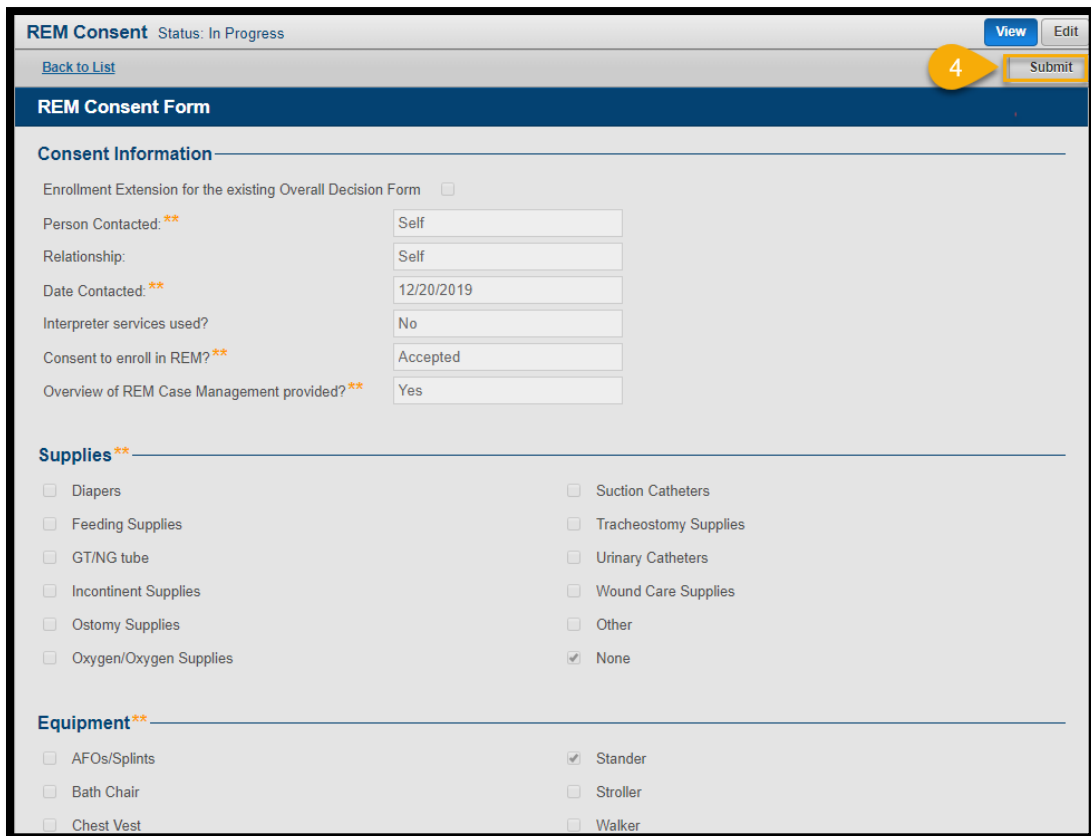


Figure 78-REM Consent Form Submit Button

Upon successful submission of the REM Consent Form, several message boxes will display:

- Success message box (green outline)
- Information box (blue outline) that confirms the Service Coordination Form has been auto generated and available to begin the next step in the enrollment process

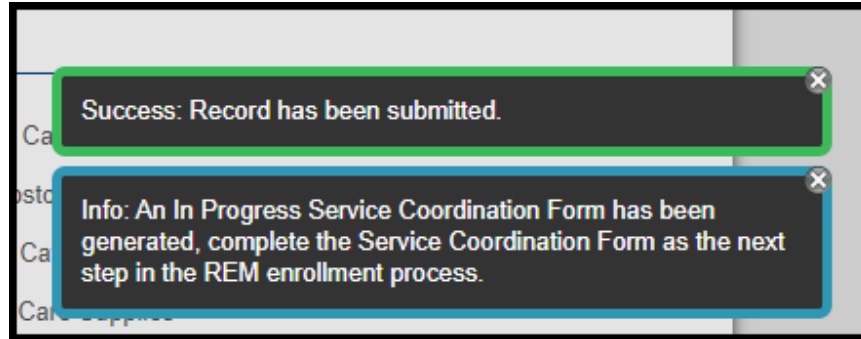


Figure 79-Submit REM Consent Form Messages

5.4 Discard REM Consent Form

The REM Consent Form can be discarded after the form has been submitted, if needed. Use the following steps to discard the REM Consent Form:

5.4.1 Primary Actors

The actors authorized to discard a REM Consent Form include:

Department	Roles
MDH	MDH REM Intake Nurse, MDH REM Administrator

Table 7-Discard REM Consent Form - Primary Actors

1. From the Client Details tab, select the **Programs** banner on the left navigation
2. Select **REM Consent** to view the list of forms
3. Select the **View** hyperlink under the Actions column to display the REM Consent Form in view (read-only) mode.

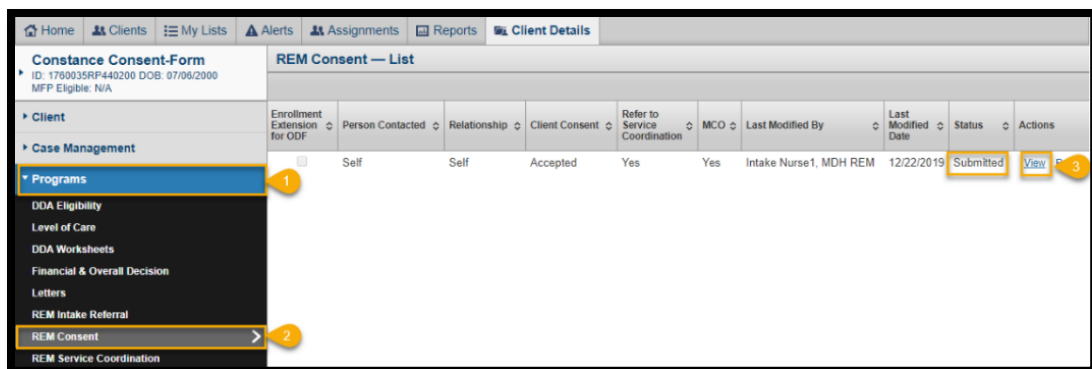


Figure 80-Discard Submitted REM Consent Form

4. The system will generate a REM Consent Form. Click **Discard**.

NOTE: Only the submitted REM Consent Form may be discarded.

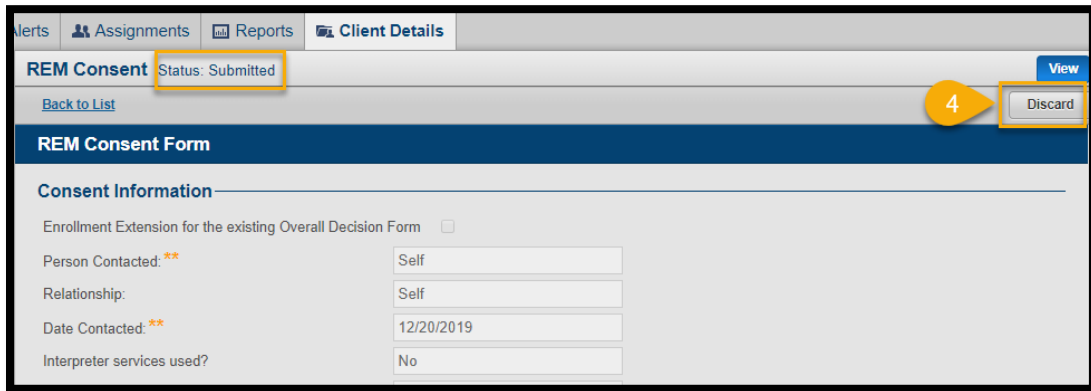


Figure 81-Discard REM Consent Form

5. Enter a text in the **Comment** field and then click **Yes** to complete the process of discarding the REM Consent Form (or click **No** to cancel discarding the form).

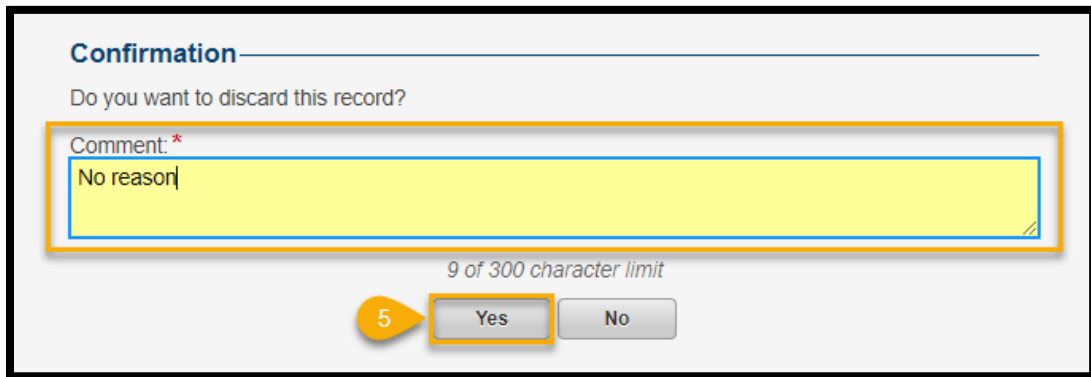


Figure 82-Discard confirmation comment

NOTE: * indicates a field required.

NOTE: Discarding the REM Consent Form also discards the linked Service Coordination Form.

The REM Consent Form List page will display the discarded status. Hover over and click the info-tip icon ⓘ to display the discard comment.

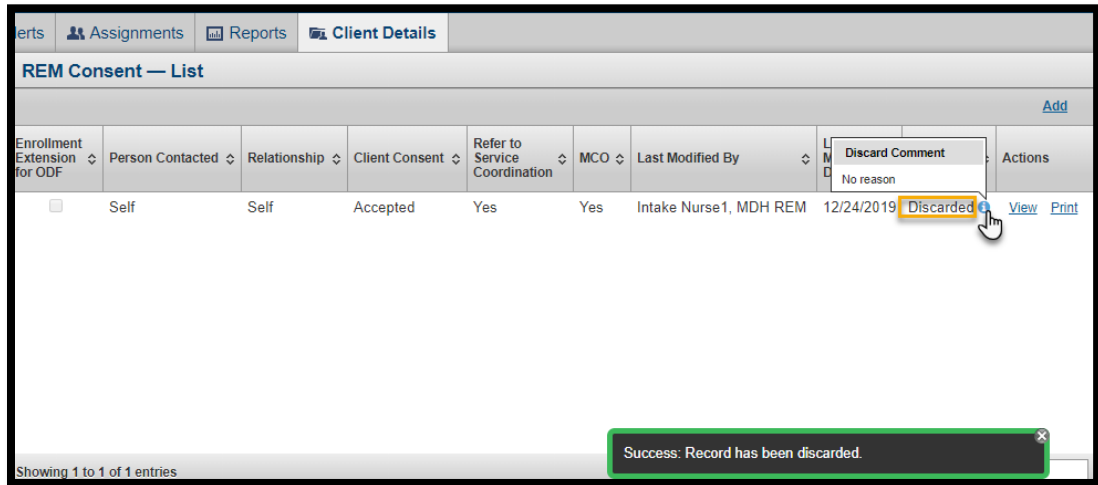


Figure 83-REM Consent Form List Successful Discard Info-tip

5.5 Print REM Consent Form

Use the following steps to Print or download the REM Consent Form in PDF form:

1. From the Client Details tab, select the **Programs** banner on the left navigation
2. Select **REM Consent** to view the list of forms
3. Select the **Print** hyperlink under the Actions column to display the REM Consent Form PDF in a new internet browser tab

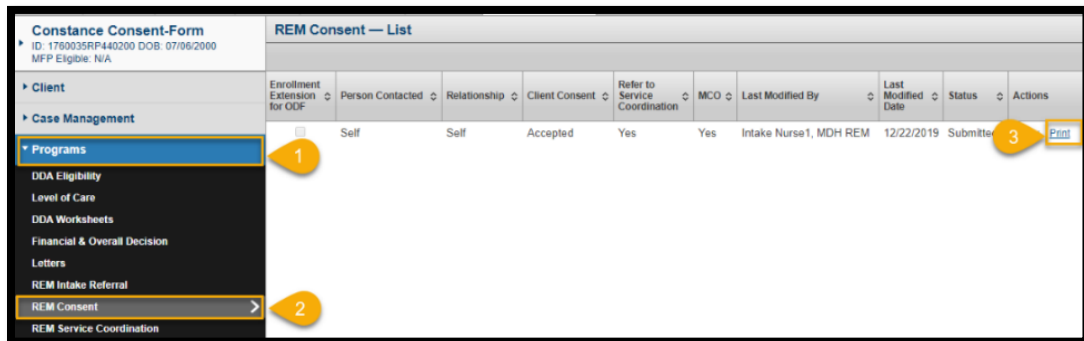


Figure 84- Print REM Consent Form

The generated PDF displays in a new internet tab. From here, the user may print, download, and or adjust the zoom level using the view settings.

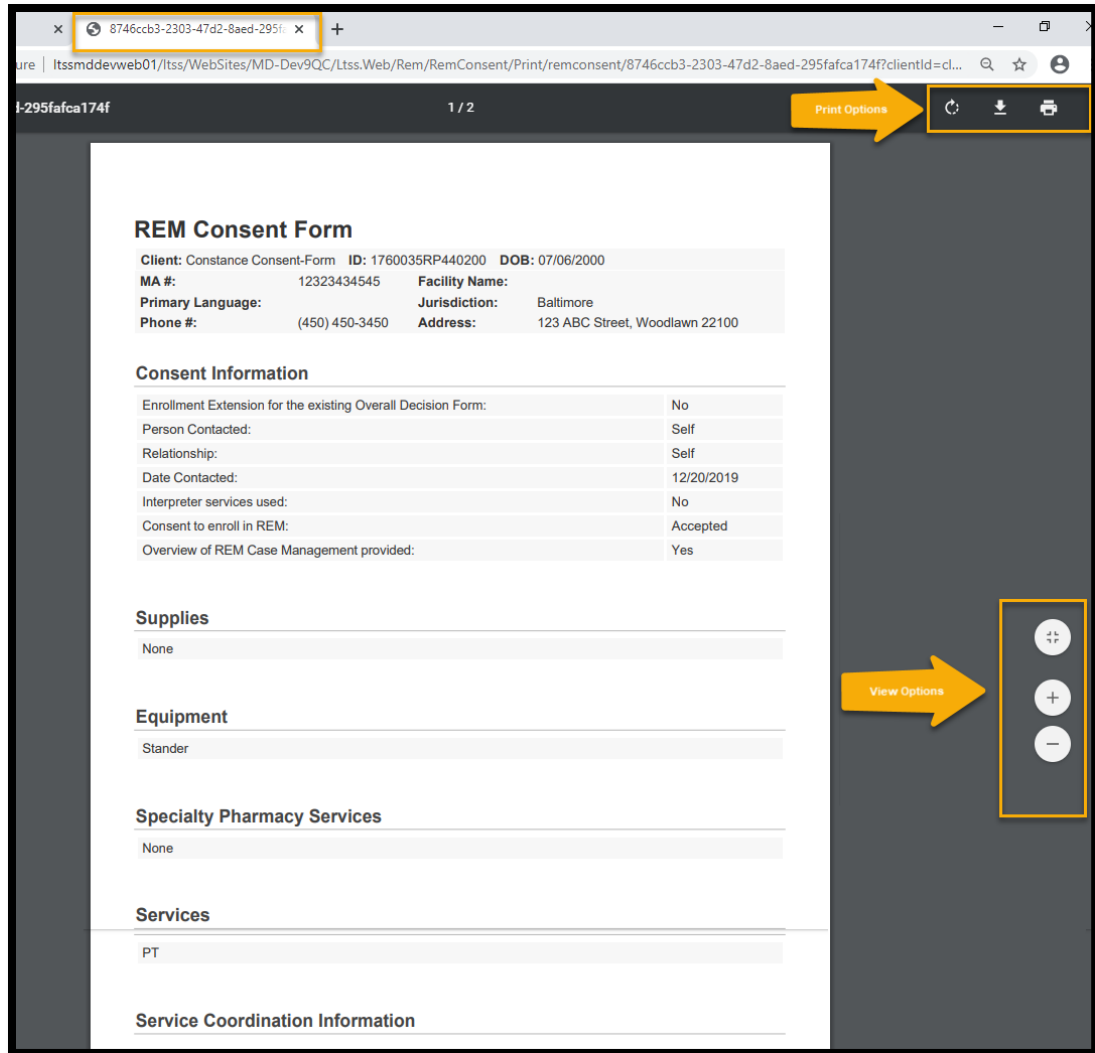


Figure 85-REM Consent Form PDF

6 Case Management Agency (CMA) Assignments

Maryland Department of Health (MDH) is responsible for assigning the REM approved Client to a Case Management Agency (CMA.) The assignment cannot be completed until the following preconditions have been met:

- An “Active” and “Approved” REM Intake Form
- A submitted and accepted REM Consent Form

6.1 Assigning a CMA to the Client


To assign the CMA to the Client, follow these steps:

6.1.1 Primary Actors

Department	Roles
MDH	MDH REM Administrator, MDH REM Intake Specialist, MDH REM Intake Nurse

Table 8-REM CMA Assignment - Primary Actors

6.1.2 Case Management Agency (CMA) Selection

1. From the **Client Details** tab, select the **Case Management** banner on the left navigation pane
2. Select **Agency Selection**
3. Click the  icon to expand the REM CMA Assignment banner
4. Select **Assign REM CMA** button

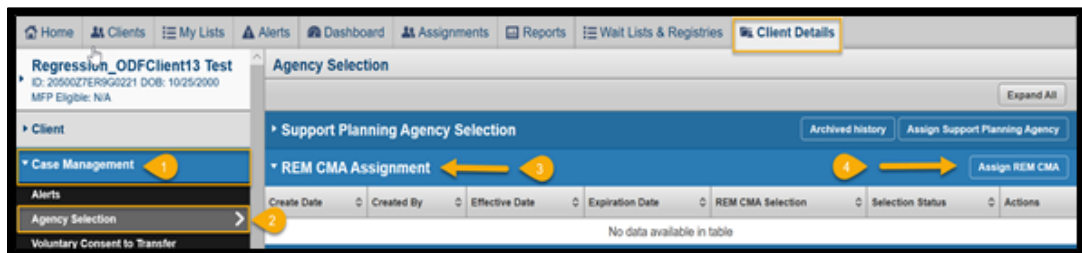


Figure 86-REM CMA Assignment

5. The REM CMA Assignment Form is displayed in edit mode. The authorized user completes the following fields within the Case Management Agency Selection section:
 - County of Residence
 - Case Management Agency. **NOTE:** The agency list is restricted to REM providers (i.e. provider type 87 and MDH REM.)
 - Reason for Selection (e.g. initial selection, unable to locate, other)

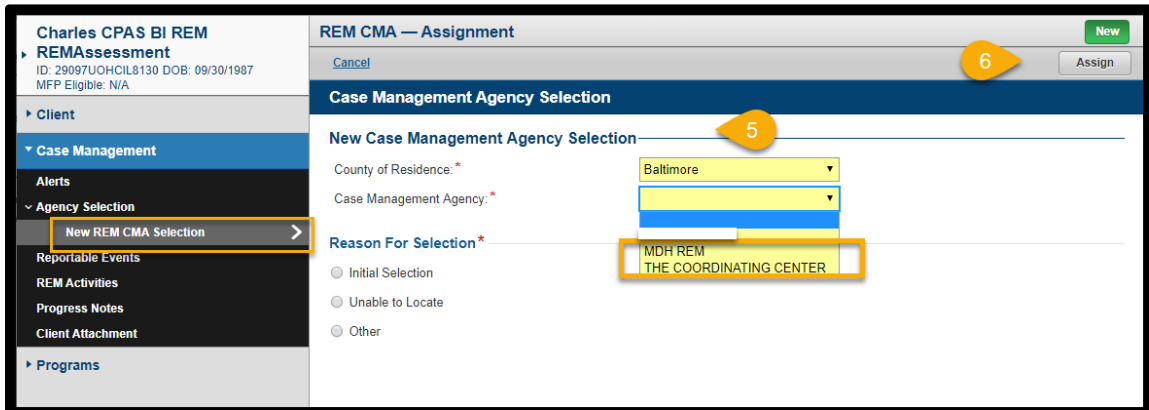


Figure 87-View REM CMA Assignment Selection Fields

6. Click the **Assign** button. The Case Management Agency Selection form will be displayed in read-only mode and a success message will be displayed (green outline.) The assignment date will be recorded in the Effective Date field. An alert will be sent to CMA REM administrator and CMA REM intake specialist.

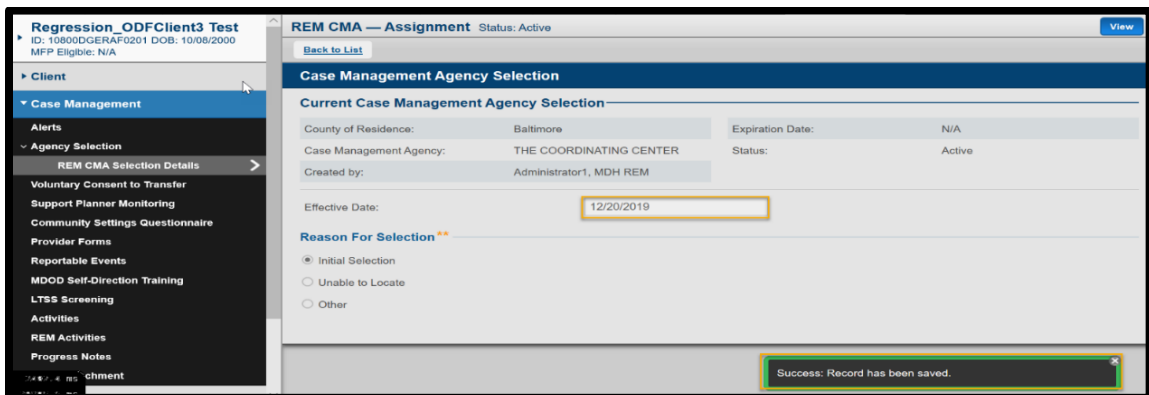


Figure 88-View REM CMA Assignment Selection - Record Saved

NOTE: ** indicates a field required to **Submit** the form
 * indicates a field required to **Save** the form

6.1.3 CMA Agency Selection List Page

Once a CMA is assigned to the Client, the assignment record will be displayed in REM CMA Assignment Panel on Agency Selection page.

NOTE: The **View** hyperlink beneath the Actions column navigates to the read-only mode of the agency assignment.

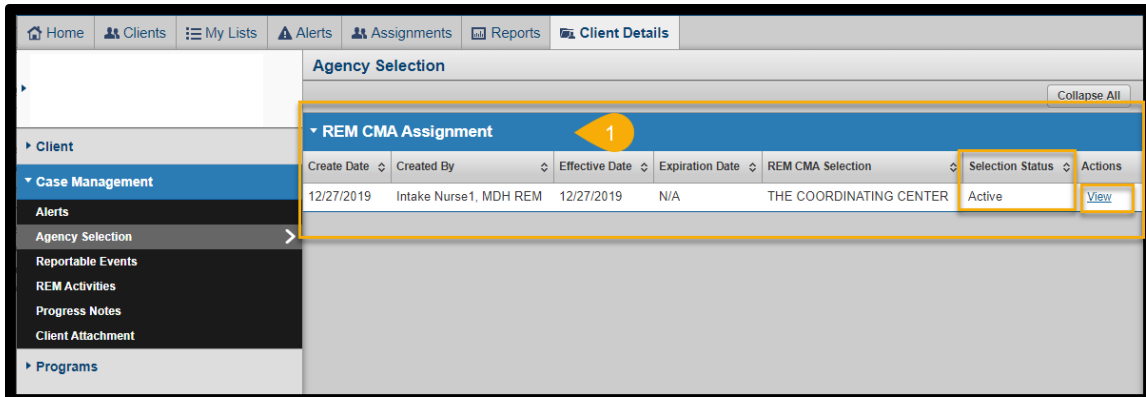


Figure 89-View REM CMA Assignment Selection - Record Saved

6.1.4 Active and Inactive State of an Agency Assignment

The following are the rules for when agencies become active and inactive:

- An agency assignment remains active until another agency is re-assigned to the Client
- If an agency is re-assigned, then the previous assignment becomes inactive and the new assignment becomes active
- The date when agency became inactive is displayed in Expiration Date field
- An agency assignment can also become inactive if a Client gets disenrolled from REM

6.2 Alerts for CMA Assignment

Authorized users and assigned agencies receive Alerts when a Case Management Agency is assigned. The CMA REM Administrator and CMA Intake Specialist receives an alert when their agency is assigned to the Client.

6.2.1 Alerts Tab

Follow these instructions to access alerts regarding the assignment of a Client’s record:

1. Select the **Alerts** tab
2. Enter desired criteria to better specify applicable search results and click the **Filter** button.
3. Select the desired alert message under the Subject column.

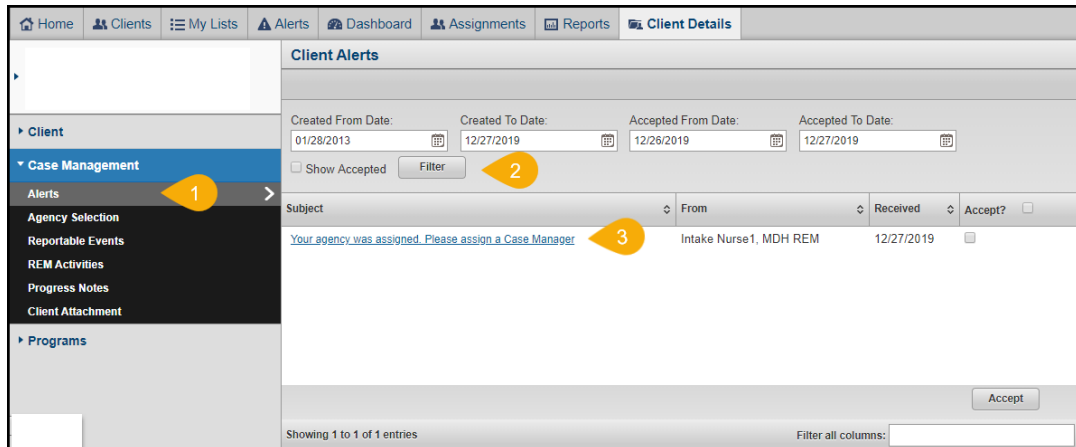


Figure 90- Client Alerts Page

4. The system will navigate to the **Client Details** tab, where the user can review the Client’s profile and relevant case information.

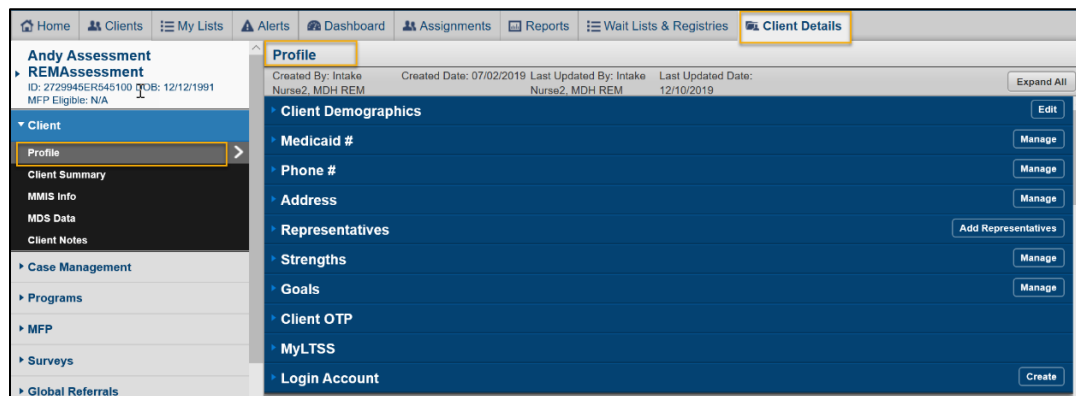


Figure 91-Staff Assignment Menu

7 CMA Case Manager Assignment

Once a Case Management Agency (CMA) is assigned to the Client, users from that CMA can assign a CMA REM case manager. The following preconditions must be met before a CMA REM Case Manager can be assigned:

- An “Approved” and “Active” REM Intake Form
- A submitted and accepted REM Consent Form
- An “Active” REM case management agency assignment

7.1 Primary Actors

Department	Roles
MDH	MDH REM Administrator, MDH REM Intake Specialist, MDH REM Intake Nurse
CMA	CMA REM Administrator, CMA REM Supervisor, CMA REM Intake Specialist

Table 9-CMA Case Manager Assignment - Primary Actors

7.2 Assigning a CMA Case Manager to a Client

1. Select the **Assignments** tab from the top navigation pane
2. Under the Assignment Menu, select **REM Case Manager Assignments** (left navigation pane)

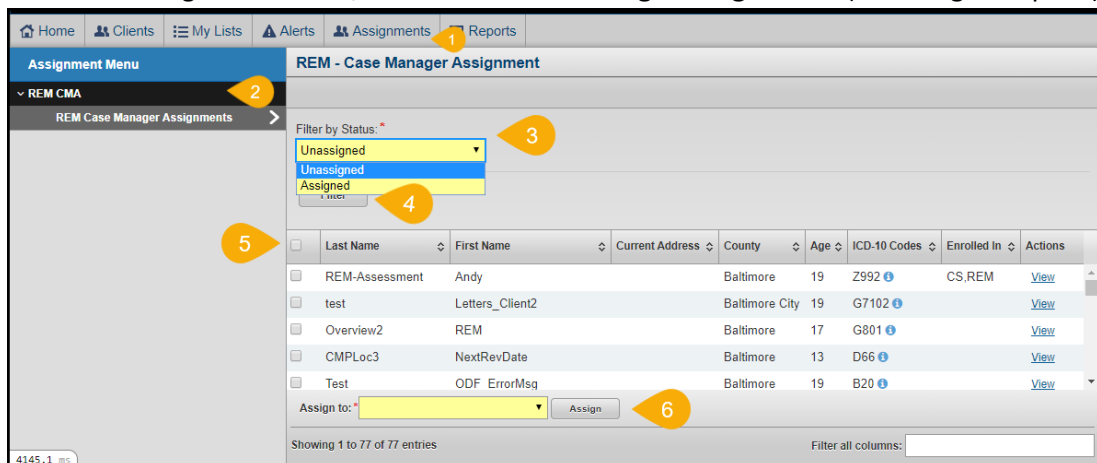



Figure 92-View REM - Case Manager Assignment

3. Select the desired Filter by Status option:
 - **Unassigned:** Search results will show Clients without an assigned a CMA REM case manager
 - **Assigned:** Search results will show Clients with an assigned CMA REM Case Manager

4. Click the **Filter** button. The system will generate a list of Client records with the following fields:

- Last name
- First name
- Current address
- County
- Age
- ICD-10 codes (**NOTE:** Hovering over the info-tip icon  displays ICD-10 code information.)
- Enrolled In
- Actions (displays options for further action)

5. Select the desired Client by clicking the **checkbox** button in the first column

NOTE: The user may also click on the **View** hyperlink, which navigates to the Client’s profile.

6. Click on **Assign To** drop-down arrow to select the CMA REM case manager to be assigned, then click **Assign**

NOTE: The number next to the Case Manager’s name denotes their caseload number.

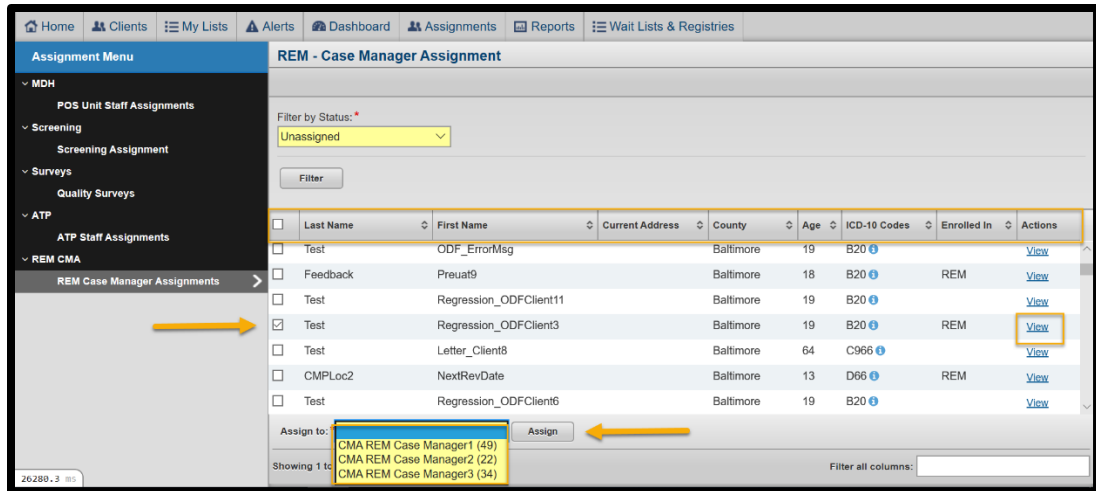


Figure 93-REM-Case Manager Assignment Selection

- Upon the user’s case manager assignment selection, the user will receive a success record confirmation (green outline) in the lower right side of the screen. The assigned case manager will receive an alert.

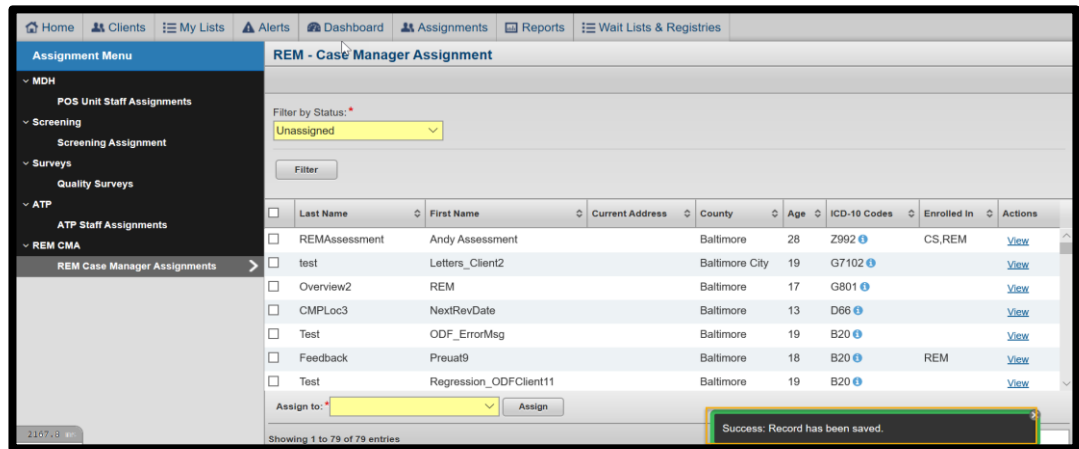


Figure 94-REM-Case Manager Assignment Selection – Record Saved

- From the REM – Case Management Assignment section, the user can view a case manager’s assigned Client cases by selecting “assigned” in the **Filter by Status** dropdown
- The REM CMA case manager field populates with the REM Case Managers’ names and with their corresponding caseload number. Select the desired REM CMA case manager’s name and click the **Filter** button.
- To view a Client’s record, click on the **View** hyperlink

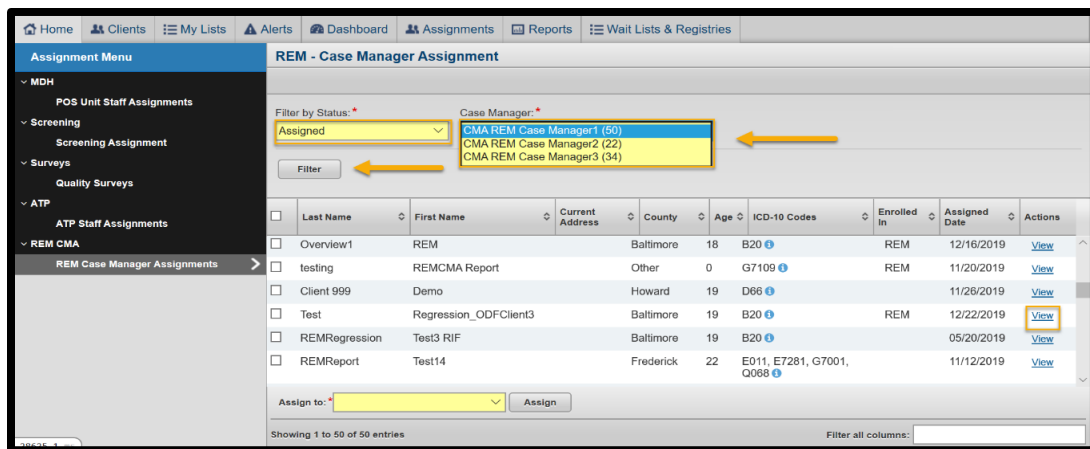


Figure 95-REM-Case Manager Assignment Selection - Assigned

- The CMA REM case manager can view his or her newly assigned cases by selecting the Alerts tab. Click on the “You are assigned” hyperlink to navigate to the Client.

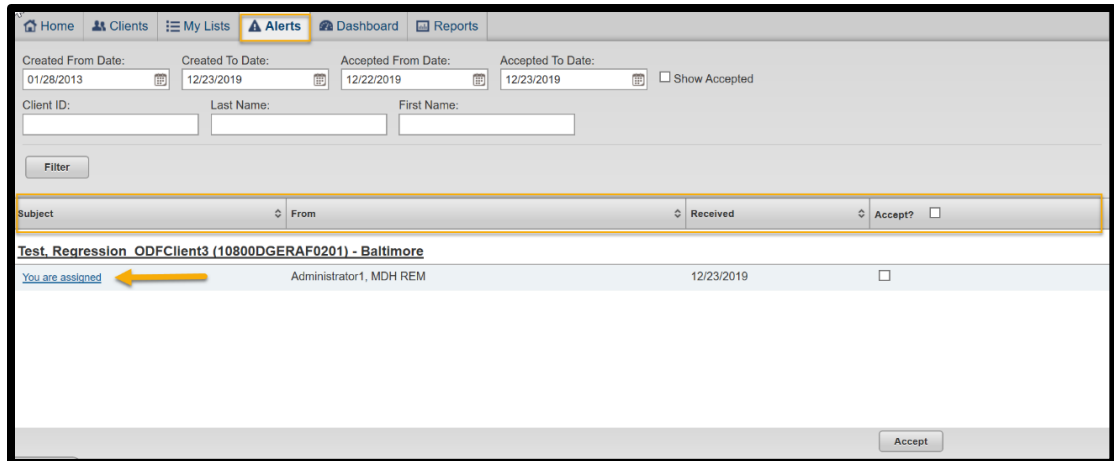


Figure 96-Alerts – REM CMA Case Manager

- The user will be redirected to the **Client Details** tab, where the user can review the Client’s profile. A message will be displayed (blue outline) on the bottom of the screen if information is missing. If necessary, update the missing information by clicking the **Edit** button in the **Client Demographics** section.

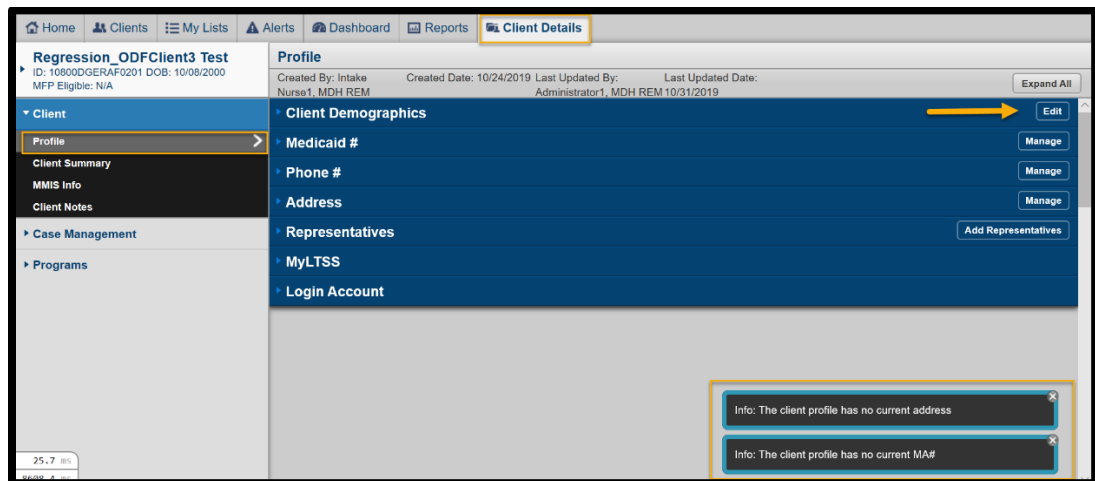


Figure 97-Alerts – View Client Details - Profile

NOTE: ** Indicates a field required to submit
 * Indicates a field required to save

7.3 Re-Assigning a Client to a Different CMA REM Case Manager

Follow these steps to reassign a Client to a different CMA REM case manager:

- From the **Client Details** tab, select the **Assignments** tab

- Under the Assignment menu, select **REM Case Manager Assignments** on the left navigation pane

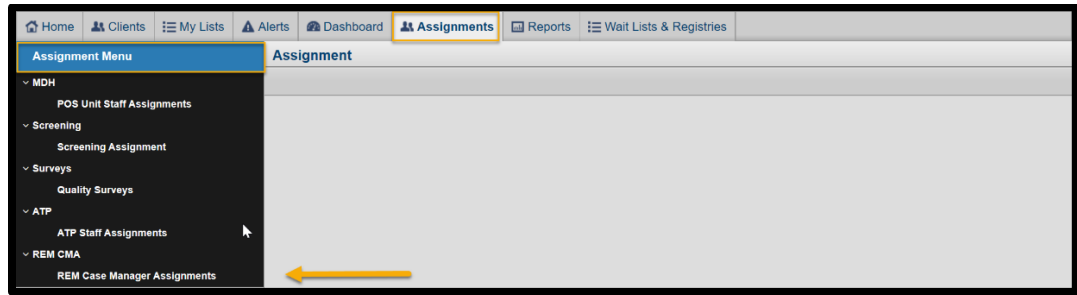


Figure 98-Assignment Menu

- Selected **Assigned** from the Filter by Status dropdown

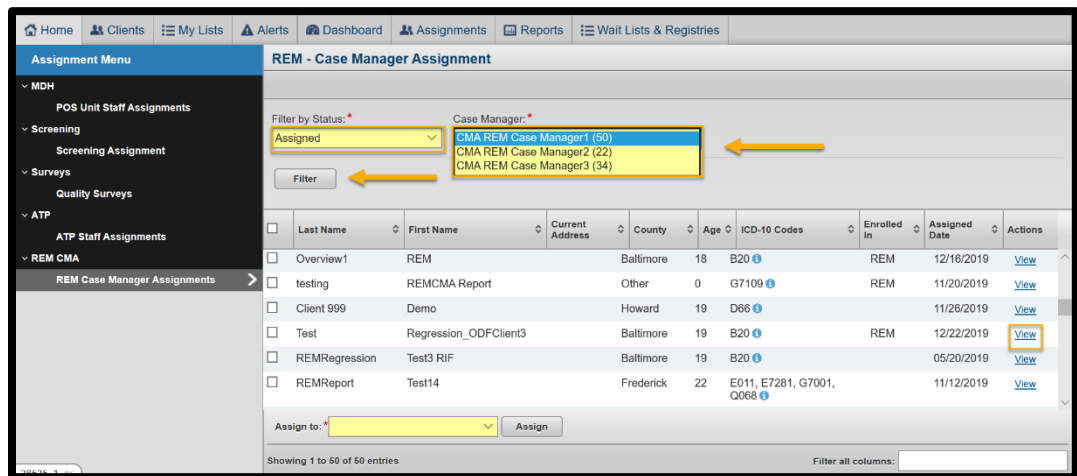


Figure 99-REM - Case Manager Assignment - Assigned

- Click the **Filter** button. A list of applicable Client records shall appear.
- Select the desired Client by clicking the corresponding **checkbox** button

NOTE: The user may also click on the **View** hyperlink which redirects the user to the Client's profile.

- Click on **Assign To** drop-down arrow to select the assigned CMA REM Case Manager then click **Assign**.

NOTE: The number next to the case manager’s name denotes their caseload number.

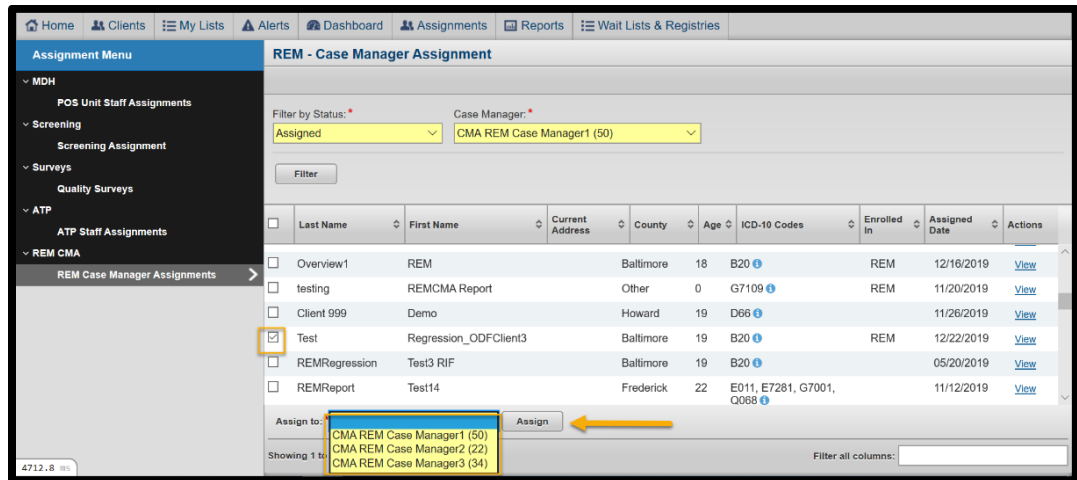


Figure 100-View REM - Case Manager Assignment - Assigned

7. The Reassignment Confirmation dialog box will display. Select an option in the **Reason for Reassignment** dropdown. Reasons for reassignment include:
 - Case manager leaving agency
 - New case manager requested by individual
 - Case manager unavailable
 - Patient re-located
 - Case manager re-located
 - Staff assignment
 - Other

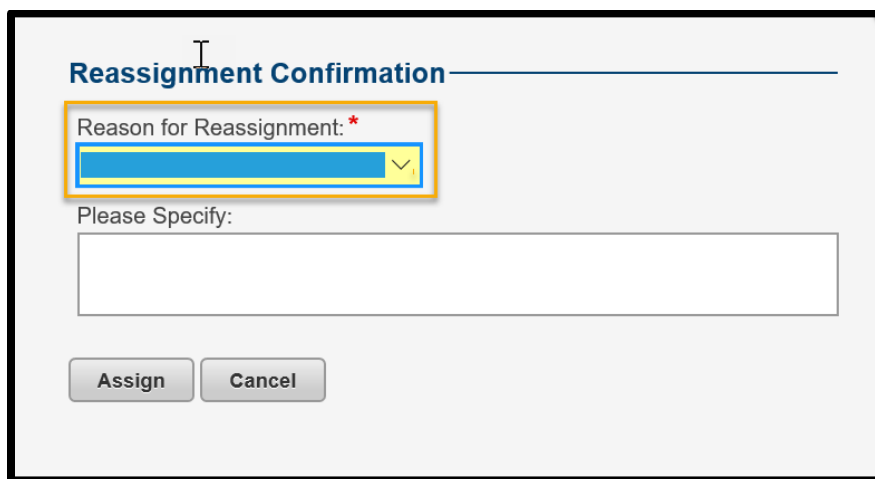


Figure 101-Reassignment Confirmation

NOTE: The user may add a comment in the **Please Specify** section. If the reason for reassignment has been set to “other,” this field is required.

8. The user will receive a success message confirmation (green outline) in the lower right side of the screen. The re-assigned Client will now show-up in the assigned list for the new case manager. An alert is sent to the old and new case manager.

7.4 Staff Un-Assignment

The following rules apply to staff un-assignment:

- Staff can be unassigned only by unassigning or re-assigning the agency or if the Client gets disenrolled.
- Case managers will receive an alert upon un-assignment

8 REM Activities

REM activities is a required feature used to document Client-specific activities performed by the authorized user. Authorized users are required to document activities on the date the activity occurred. If unable to do so, activity(s) should be backdated to reflect the accurate date.

Note: REM Activities can only be backdated to 60 days in the past.

This section explains how to add REM activities and view the list of REM activities pertaining to the Client.

8.1 Primary Actors

Department	Roles
MDH	MDH REM Administrator, MDH REM Intake Specialist, MDH REM Intake Nurse, MDH REM Physician Advisor
CMA	CMA REM Administrator, CMA REM Supervisor, CMA REM Case Manager, CMA REM Intake Specialist, CMA REM Provider Relations Rep

Figure 102-REM Activities Primary Actors

8.2 View REM Activities for a Client

Users can view REM Activities available for a Client through the REM Activities section in the left navigation pane. Upon selecting the section, the list of activities previously added for the Client are displayed. User can click on the hyperlink under actions column for any activity to view more details about it.

8.2.1 View REM Activities List

Follow these steps to view the REM Activities list:

1. When viewing a Client’s profile/relevant details, select the **Case Management** banner on the left navigation pane
2. Select **REM Activities** option
3. System displays **REM Activities – List** page, with a list of the Client’s activity records.
 - **Start date:** Defaults to the 1st of the previous month
 - **End date:** Defaults to the current system date
 - **Staff:** List of staff who has added a REM Activity for the Client
 - **Activity status:** Status of the Activity i.e. Submitted or Discarded
 - **Activity:** List of the options in the Activity field
 - **Type:** List of the options in Type field.

NOTE: The activity information section will be blank if there are no saved activity records for the for the Client for the criteria selected.

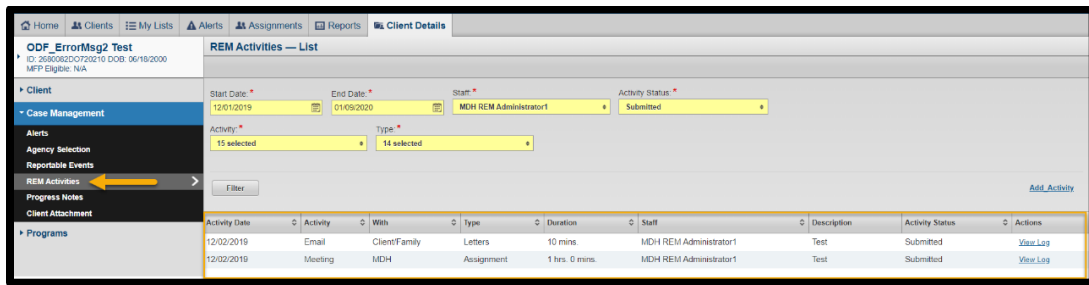


Figure 103-REM Activities – List

8.2.2 View Details of a REM Activity

1. Click the **View Log** hyperlink under the Actions column of the desired activity.

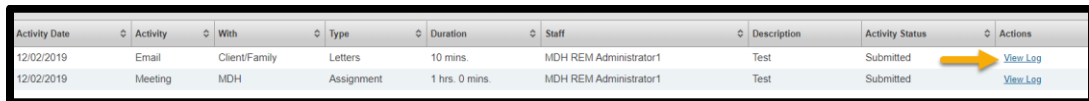


Figure 104-REM Activities - View

2. System redirects the user to the **Activity Logs for Date: [MM/DD/YYYY]** subsection for the selected Activity. (Here [MM/DD/YYYY] represents the date of the activity.) The subsection will display the list of Activities submitted for the date.

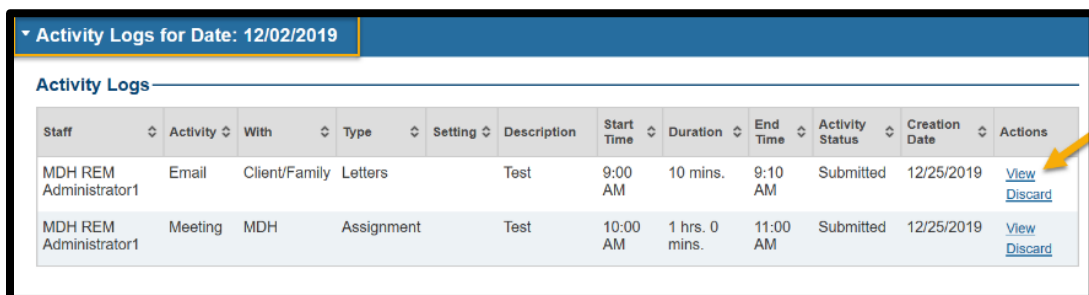


Figure 105-REM Activities – Activity Record

3. Click the **View** hyperlink for any activity to view additional details about it

The screenshot shows a web interface for viewing an activity record. At the top, there is a blue header with the word 'Activity' and a search bar. Below this, the page is titled 'Activity Record' and shows the status as 'Submitted' and the creation date as '12/25/2019'. The 'Activity Information' section includes fields for 'Activity Date' (12/02/2019), 'Staff' (Administrator1, MDH REM), 'Activity' (Email), 'With' (Client/Family), and 'Type' (Letters). A 'Description' field contains the text 'Test'.

Figure 106-REM Activities – Activities Detail (Read Only)

4. System displays Client’s activity(s) in read-only mode.

8.3 Add Activity Record

This feature allows authorized users to add their daily activities with Clients, representatives, providers, professionals, and all other relevant individuals to LTSS.

1. Navigate to the **REM Activities – List** section and click on the **Add Activity** hyperlink

The screenshot shows the 'REM Activities – List' page. On the left is a sidebar with navigation options: Home, Clients, My Lists, Alerts, Assignments, Reports, Client Details, Client, Case Management, Alerts, Agency Selection, Reportable Events, REM Activities (highlighted), Progress Notes, Client Attachment, and Programs. The main content area shows filters for Start Date (12/01/2019), End Date (01/09/2020), Staff (MDH REM Administrator1), and Activity Status (Submitted). Below the filters is a table of activities:

Activity Date	Activity	With	Type	Duration	Staff	Description	Activity Status	Actions
12/02/2019	Email	Client/Family	Letters	10 mins	MDH REM Administrator1	Test	Submitted	View Log
12/02/2019	Meeting	MDH	Assignment	1 hrs 0 mins	MDH REM Administrator1	Test	Submitted	View Log

An 'Add Activity' button is located at the bottom right of the table area, highlighted with a yellow arrow.

Figure 107-REM Activities – Add Activity

2. System displays **Add Activity** pop up and prompts for the date the Activity occurred.

3. Add the Date of the Activity and select **Continue**.

NOTE: Users should submit all activities on the date they were performed, unless they are unable to do so.

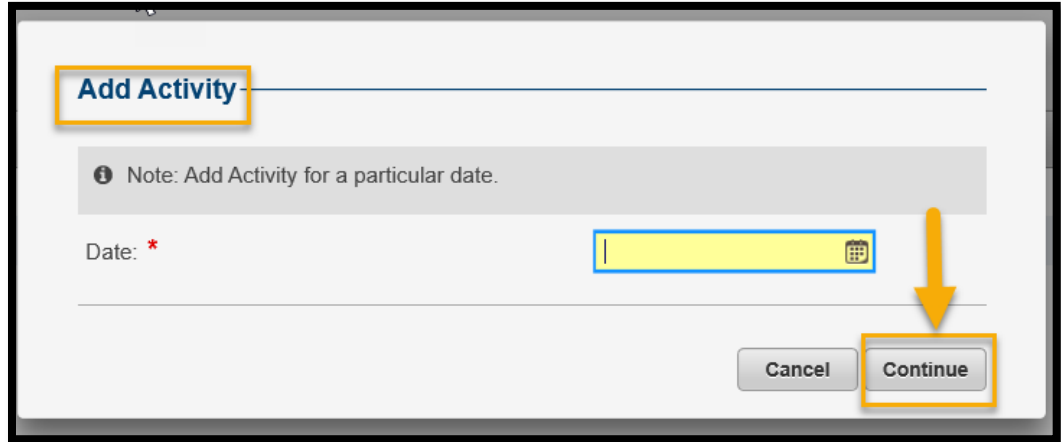


Figure 108-Add Activity Dialog Box

4. The **Activity** dialog box will appear. The user must select in the following fields in to save the activity:

- Activity
- With
- Type
- Description
- Start time

NOTE: Fields with * are required to save and submit

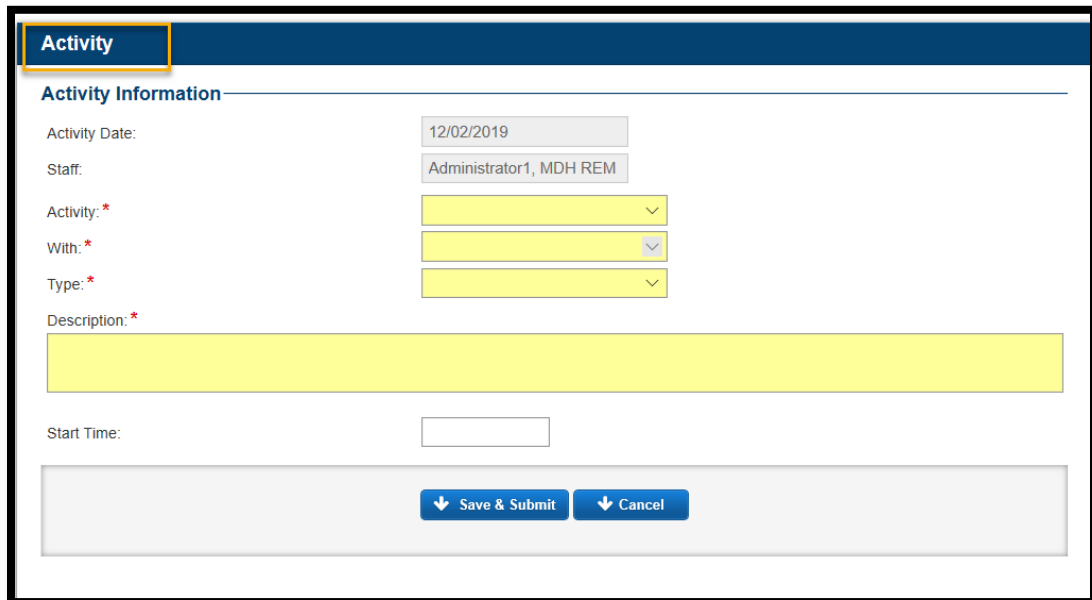


Figure 109- REM Activities – Activity Record

5. Select the **desired Activity** option. Values available for selection:

- Appointment
- Documentation
- Email
- Fax
- Mail Received
- Mail Sent
- Meeting
- Phone
- Phone Attempt
- Report
- Research
- Transfer
- Visit
- Visit Attempt
- Other

The screenshot shows a web form titled "Activity" with a sub-section "Activity Information". The form contains several input fields: "Activity Date:" (12/02/2019), "Staff:" (Administrator1, MDH REM), "Activity: *" (with a dropdown menu open), "With: *", "Type: *", "Description: *" (with a text area), and "Start Time:". The dropdown menu for "Activity" lists the following options: Appointment (highlighted in blue), Documentation, Email, Fax, Mail Received, Mail Sent, Meeting, Phone, Phone Attempt, Report, Research, Transfer, Visit, Visit Attempt, and Other. A yellow arrow points to the "Activity:" label.

Figure 110- Add Activity – Activity Field

6. Select the desired **With** option. Different set of values are available for selection based on the selections made in the previous fields. This category should describe with whom the user performed the action. (When an activity is taken by or on behalf of a provider relations representative, always choose "Provider relations rep" in this category.)

The screenshot shows the 'Activity Information' section of a form. The 'With:' field is a dropdown menu that is currently open, displaying a list of roles. A yellow arrow points to the dropdown arrow of the 'With:' field. The dropdown list includes the following options: Client/Family, DSS, EVS, Facility, MCO, MCO SNC, MDH, MMIS, Nursing, Other Physician, PCP, Physician Advisor, Professional, Provider, Provider Relations Rep, Referral Source, REM CM, REM Intake, Supervisor, and Other. The 'Activity:' field is set to 'Phone'.

Figure 111- Add Activity – With Field

7. Select the desired **Type** option. A different set of values are available for selection based on the selections made in the previous fields. (When an activity is taken by or on behalf of a Provider Relations Representative, always choose "Other.")

The screenshot shows the 'Activity Information' section of a form. The 'Type:' field is a dropdown menu that is currently open, displaying a list of activity types. A yellow arrow points to the dropdown arrow of the 'Type:' field. The dropdown list includes the following options: Assessment, Assignment, Case Management Plan, Consent Form, Cost & Utilization Data Review, Eligibility, Letters, None, Overall Decision Form, Referral, Request for Case Closure, Service Coordination, Waiver Transaction Form, and Other. The 'With:' field is set to 'Client/Family'.

Figure 112- Add Activity – Type Field

- Enter details of the activity in the **Description** textbox, then enter the Start Time of the activity, the duration or end time. Then click **Save & Submit**.

NOTE: The **Start Time** field is optional. If the user enters a start time, the “Duration” or “End Time” fields are required.

- Duration:** Conditionally required if start time is entered. Numeric separate textbox for hours and minutes. Only allow 0-24 in hours and 0 to 59 in minutes. Format: **XX hrs. XX min.** The system will not allow a duration more than 24 hours total.
- End Time:** Optional. Textbox with time field (AM and PM, 12 hours clock.) Calculate and pre-populate with end time if start time and duration are entered. End time should not be less than start time.

The screenshot shows a web form titled "Activity" with a sub-section "Activity Information". The form contains the following fields and controls:

- Activity Date:** 12/02/2019
- Staff:** Administrator1, MDH REM
- Activity:** Phone (dropdown menu)
- With:** Client/Family (dropdown menu)
- Type:** Consent Form (dropdown menu)
- Description:** A large yellow text area with the placeholder text "Add a description." An orange arrow points to this field.
- Start Time:** 9:00 AM (time picker). An orange arrow points to this field.
- Instructions:** "This duration should reflect the total time spent on this activity for the selected date. Please do not round." and "Please enter Duration OR End Time."
- Duration:** A radio button is selected. It consists of two input boxes: "0" for hours and "30" for minutes. An orange arrow points to the minutes box.
- End Time:** An unselected radio button followed by an empty time input field.
- Buttons:** "Save & Submit" and "Cancel" buttons at the bottom. An orange arrow points to the "Save & Submit" button.

Figure 113- Add Activity – Description Field

- Upon selecting **Save & Submit**, system displays a confirmation success message (green outline.)

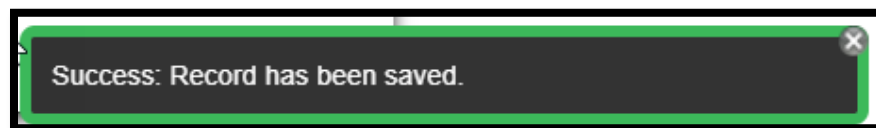


Figure 114-View REM Activities – Activity Saved Confirmation Message

8.4 Add Activity from the Activity Record Page

Users can also add an activity from the Activity Record page, under the **Add Activity** panel.

NOTE: The Client must have existing activity records in the Activity Log to add an Activity Page in this section.

1. From **REM Activities – List** section, click on the **View Log** hyperlink on one of the existing Client activity records.

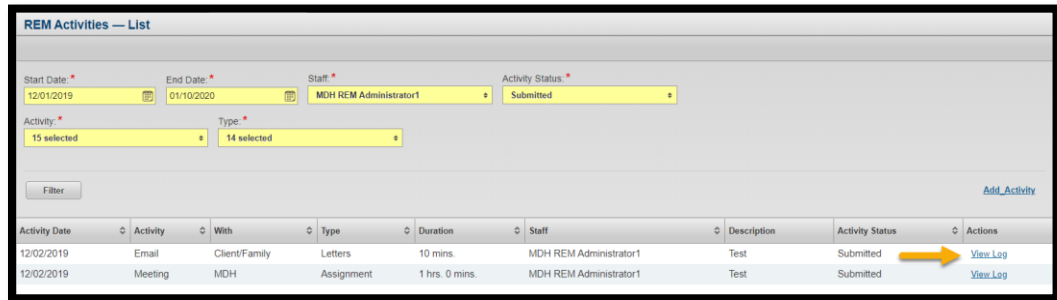


Figure 115-REM Activities List – View Log

2. System displays the **REM Activities – Activity Record** section which has two (2) subsections: **Activity Logs for Date: [MM/DD/YYYY]** and **Add Activity**.
3. Click the **Add Activity** panel.

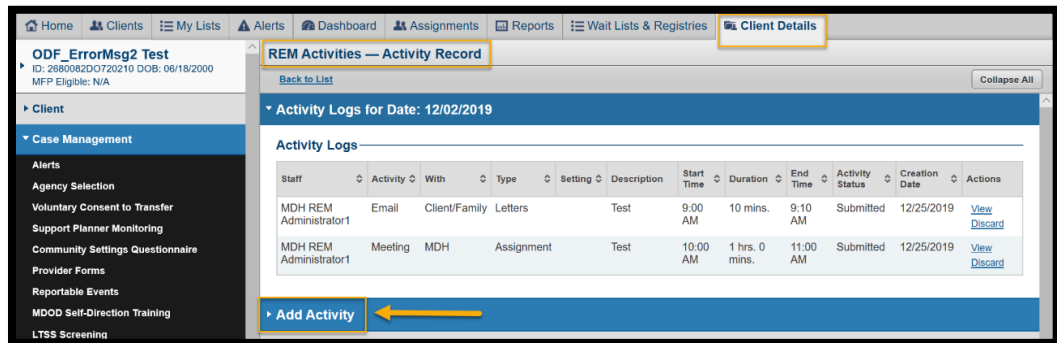


Figure 116-REM Activities – Activity Record

4. The **Activity** dialog box will appear, and the user can select and enter details in the following fields in order to save the new activity:
 - **Activity:** Appointment, documentation, email, fax, mail received, mail sent, meeting, phone, phone attempt, report, research, transfer, visit, visit attempt
 - **With:** Client/family, DSS, other physician, PCP, professional, provider, provider relations rep, REM CM, other
 - **Type:** Assessment, assignment, case management plan, consent form, cost & utilization data review, eligibility, letters, none, overall decision form, referral, request for case closure, service coordination, waiver transaction form, other

- **Description:** Enter adequate information to describe the activity that took place and who was involved.
- **Start Time:** If start time is entered then end time field and duration will be displayed and at least one will be required to save.

NOTE: Fields with * are required to save and submit.

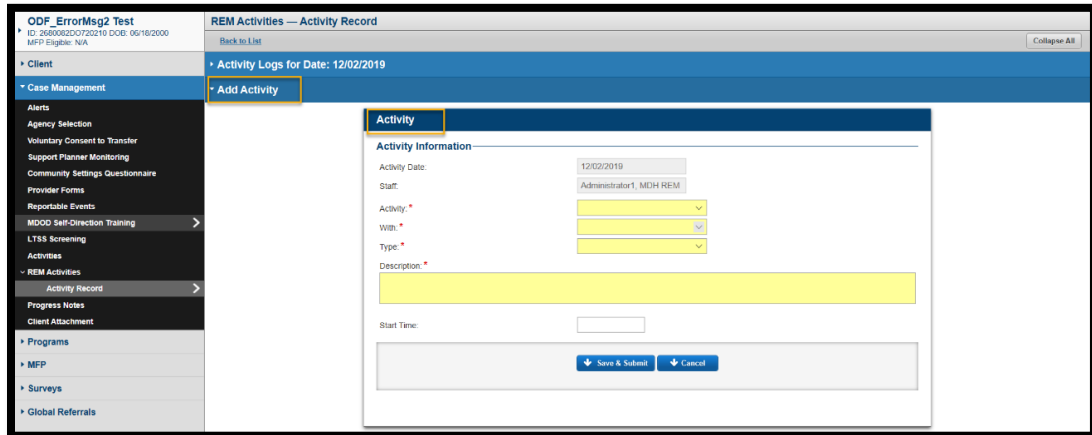


Figure 117-REM Activities – Activity Record

5. Complete the required fields. Click **Save & Submit** to successfully save the record.

8.5 Discard a Submitted Activity Record

An authorized user has the option to discard a submitted activity record.

1. From **REM Activities – List** section, select the desired activity record by clicking on the corresponding View Log hyperlink.

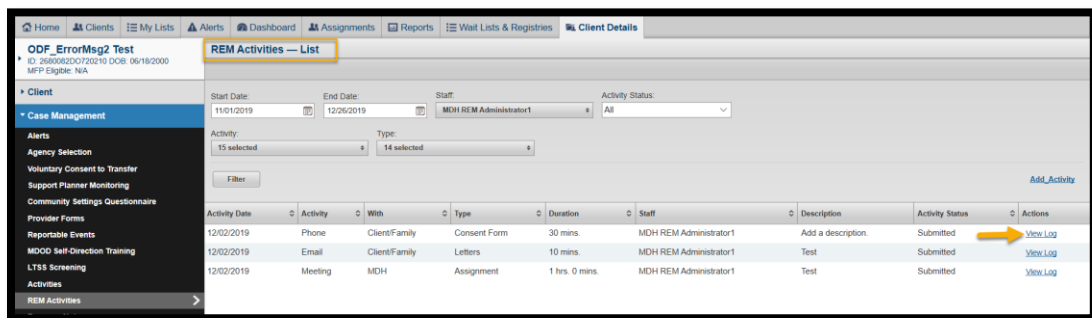


Figure 118-REM Activities – List

2. Click the **Discard** hyperlink on the desired Activity record.

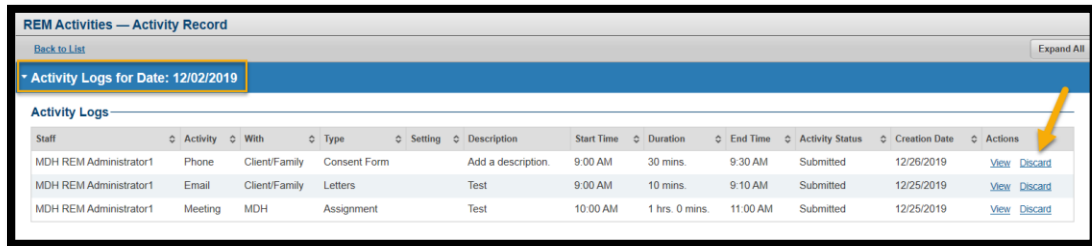


Figure 119-REM Activities – Activity Record

3. System displays a prompt (**Discard Confirmation**) asking the user to confirm the action.
3. If you are sure about discarding the Activity, add a detailed reason in the comment field and select **Yes**.

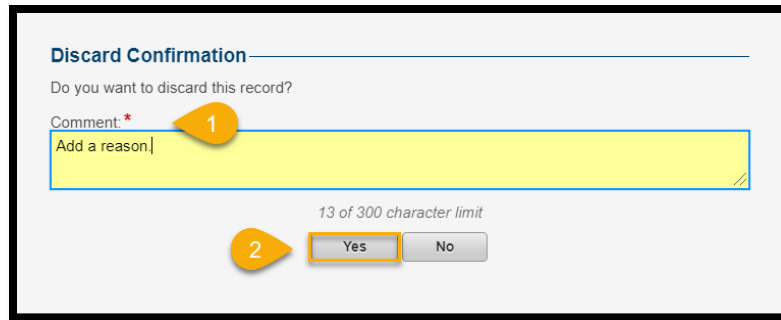


Figure 120-Discard Confirmation

4. Once the activity record has been discarded, you will be redirected to the Client’s **Activity Logs for Date: [MM/DD/YYYY]** page.
5. System displays a confirmation message indicating the activity record has been discarded, **Success: Record has been discarded.**

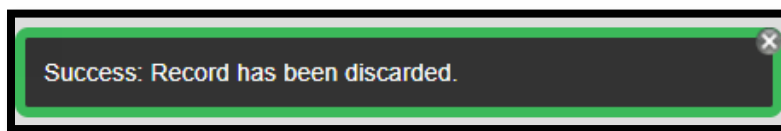


Figure 121-View REM Activities – Activity Discarded Confirmation Message

NOTE: The discarded activity record will still appear in the Activity Log; however, the field **Activity Status** will display, **“Discarded”** and the **Actions** will only display the **View** hyperlink option. The user can select the **View** hyperlink to view the activity record in *Read Only* mode (not pictured). All the authorized actors will be able to view a discarded activity.

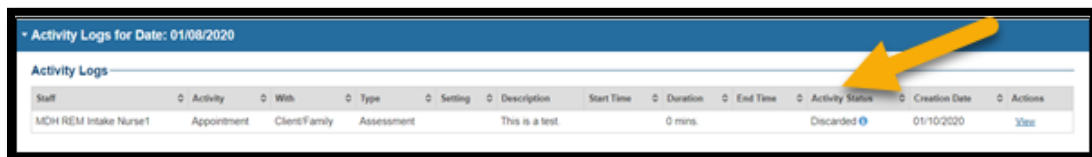


Figure 122-Activity Log – Discarded Activity Record

8.6 Print REM Activity

Once an activity has been added for a Client, authorized users may print it. There are two scenarios for printing:

- Printing the list of REM Activities for a Client
- Printing details of a single REM Activity

8.6.1 Print REM Activities List for a Client

1. Navigate to **REM Activities – List** section for the desired Client. The section will display a list of the Client’s activity records.
2. To print the **REM Activities – List**, select **Menu** located in the LTSSMaryland top banner and click **Print**.

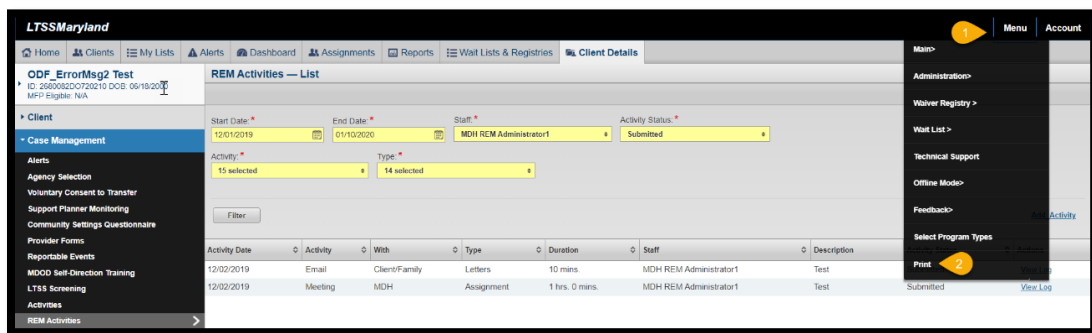


Figure 123-REM Activities - List - Print

3. Upon selection of **Print**, a new tab shall populate the .pdf of the activities list. The generated PDF displays in a new internet tab with options to **Print** or **Download** and **View** options to adjust zoom level.

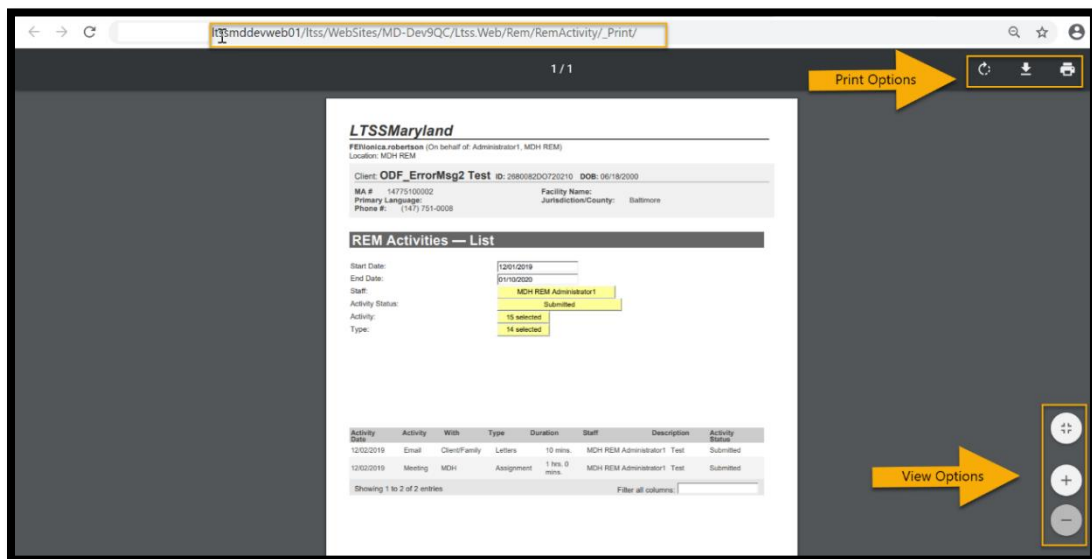


Figure 124-REM Activities - List - Save/Print

8.6.2 Print Details of a REM Activity

The user can print details of an individual REM Activity.

1. From the **REM Activities – List**, select the Client’s record and click the **View Log** hyperlink which shall redirect the user to the **Activity Logs for Date: [MM/DD/YYYY]** subsection.

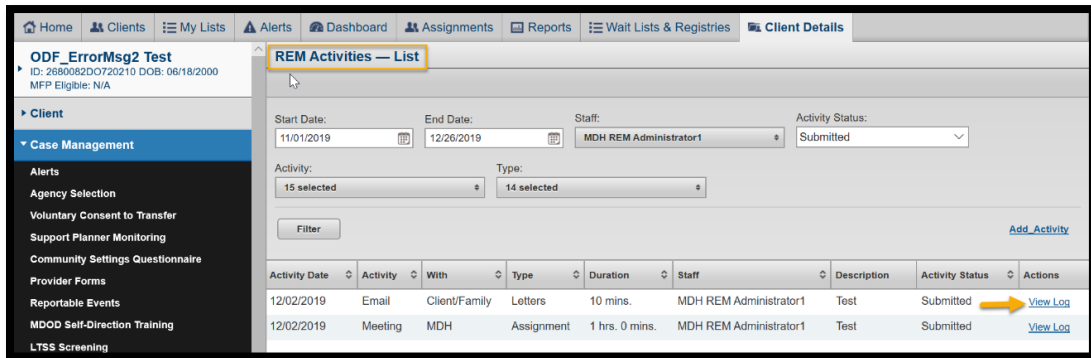


Figure 125-REM Activities - List – View Log

2. Click the View hyperlink. The hyperlink will redirect the user to the Activity Record.

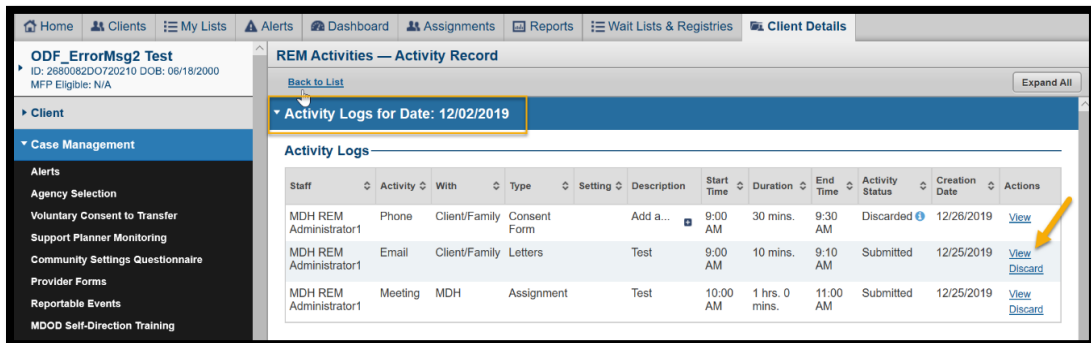


Figure 126-Activity Logs – View

- To print the **Activity Record**, select **Menu** located in the LTSSMaryland top banner and click **Print**.

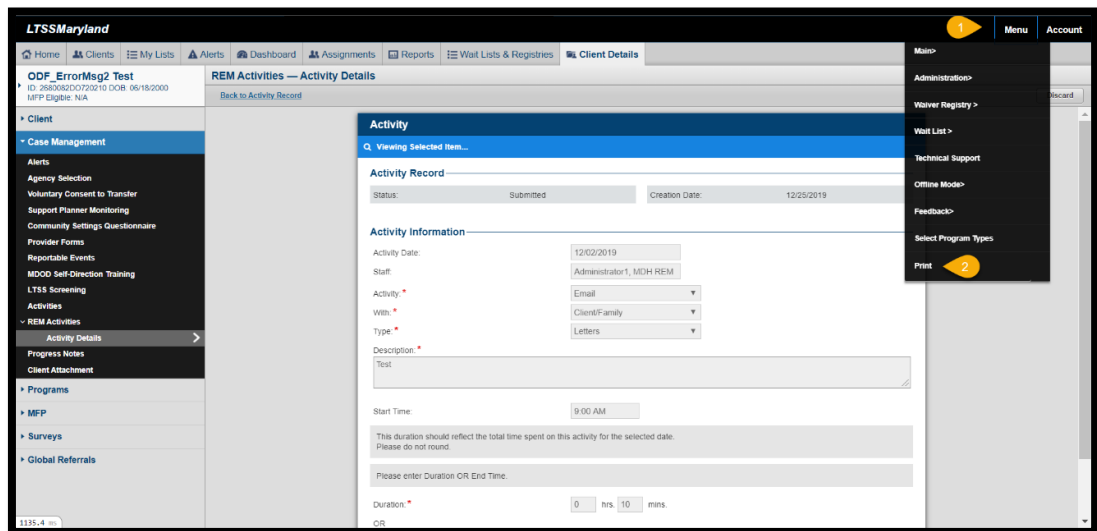


Figure 127-REM Activities – Activity Details - Print

- Upon selection of Print, a new tab shall populate the .pdf of the letter that displays letter contents based on the user’s selections at the time of creation. The generated PDF displays in a new internet tab with options to **Print** or **Download** and **View** options to adjust zoom level.

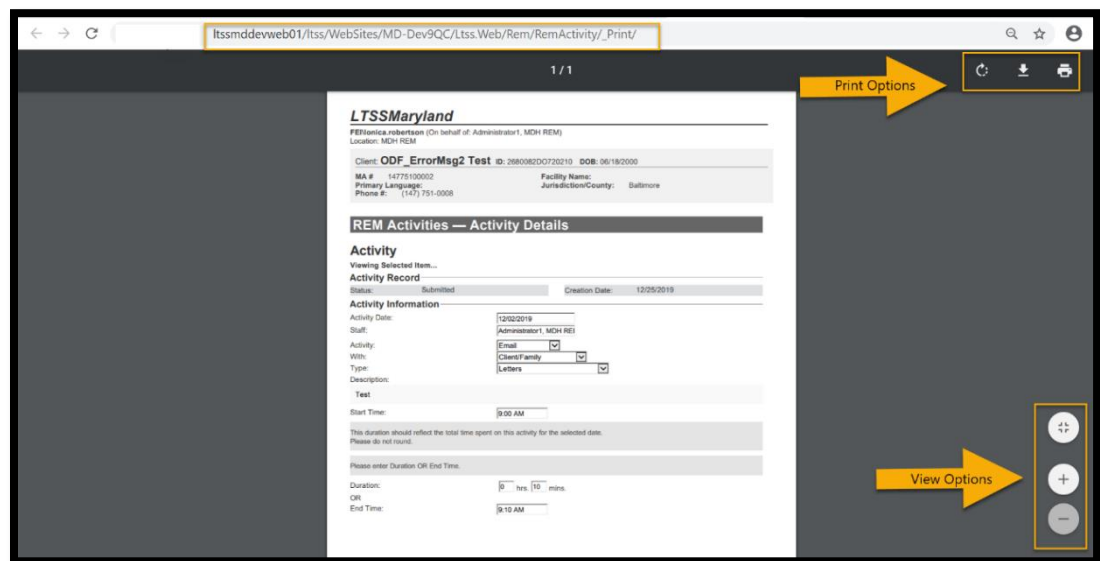


Figure 128-REM Activities – Activity Details - Save/Print

9 Service Coordination Form

Service Coordination Form (SCF) form is used by the REM unit and Case Management Agency to gather information about specific services and supplies the Client has been receiving while enrolled in MCO. It also captures the client’s preference of providers, and if they have enough supplies for transitioning into to the REM program.

9.1.1 Workflow for Service Coordination Form

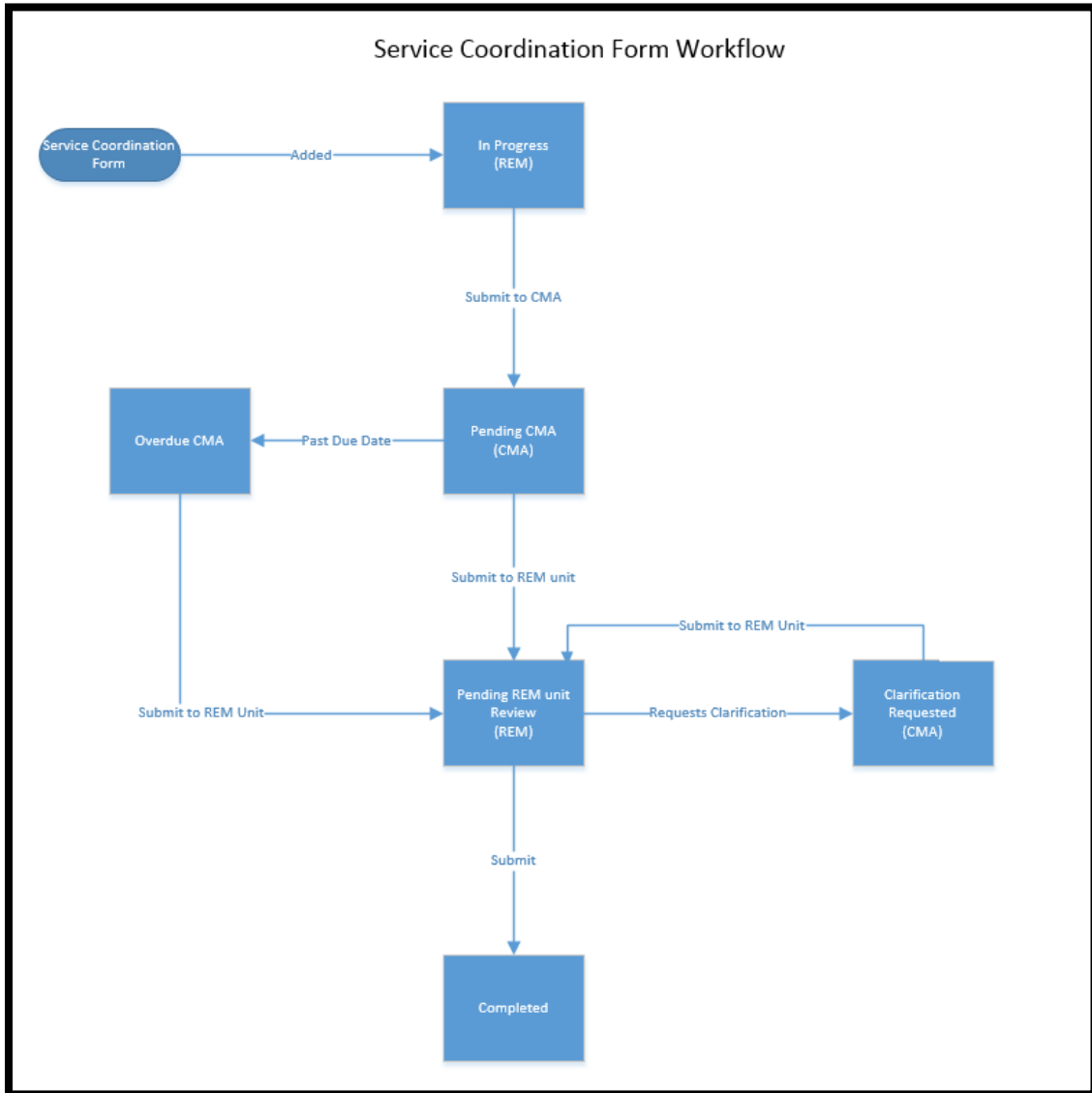


Figure 129- Service Coordination Form Workflow

9.2 Add Service Coordination Form

There are two methods for adding a SCF in LTSSMaryland:

1. **System Auto generates the form:** If a REM Consent Form specifies that the Client is to be referred to Service Coordination, system auto generates the SCF upon submission of the REM Consent Form.
2. **User manually adds a SCF from the REM Service Coordination Form – List page:** Provided there is an accepted REM Consent Form with “Refer to Service Coordination” selected but no linked SCF exists for the Client.

NOTE: A SCF will not be generated / cannot be manually added for the Client if the REM Consent Form specifies “No” for the question “Refer to Service Coordination?”.

Whenever a SCF is created, regardless of the method, system prepopulates the fields “Date to Case Manager” and “Due Date”. These fields are in editable mode, so that MDH users can modify it before submitting the form to the CMA, if needed.

9.2.1 Auto-generation via the REM Consent Form

This will be the most common scenario encountered in the system. When a REM Consent Form is submitted with the following selections, system auto generate a SCF for the Client and assign it the status of “In Progress”:

- “Accepted” for the question “Client consent to enroll in REM”
- “Yes” to “Refer to Service Coordination” field

Once auto generated, system sends an alert to MDH users with REM Intake Nurse role.

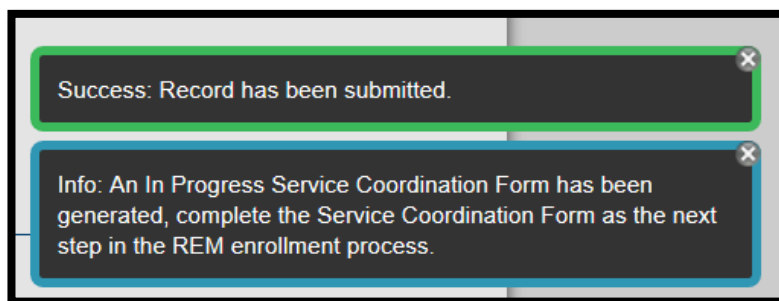


Figure 130 – Confirmation message once a REM SCF is auto-generated

Each auto generated SCF will maintain a link to the REM Consent Form because of which it was auto-generated. In addition, system prepopulates values in Section II based on the options chosen in the linked REM Consent Form.

9.2.2 Manual addition

System allows users to discard the Submitted SCF for a Client or delete an “In Progress” SCF. In such cases, users can manually add a new REM SCF for the Client (provided the relevant REM Consent Form has not been discarded).

Department	Roles
MDH	MDH REM Administrator, MDH REM Intake Nurse

Table 10-Service Coordination Form - Manual Addition Primary Actors

To manually add a new SCF:

1. Go to the **REM Service Coordination – List** page for the Client.
2. Select **Add** link available on the top of the page

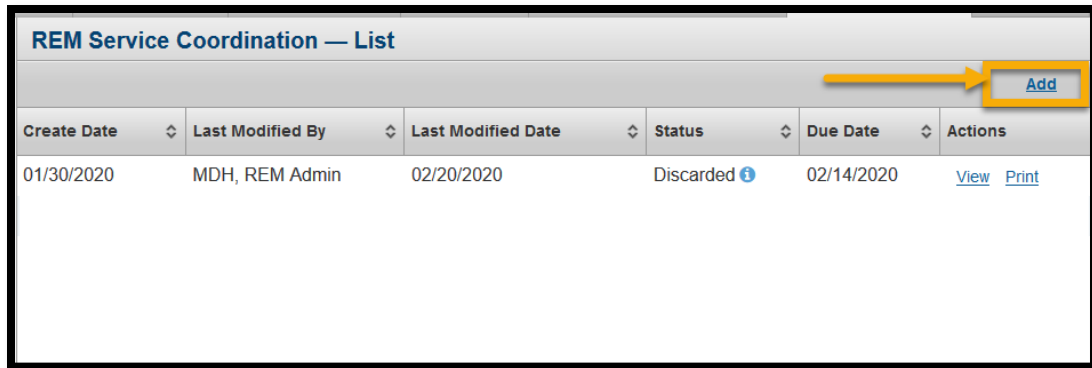


Figure 131 – Adding a SCF from REM Service Coordination - List Page

3. System Create a SCF and prepopulates the fields “Date to Case Manager” and “Due Date”. Update the fields, if needed and click Save.

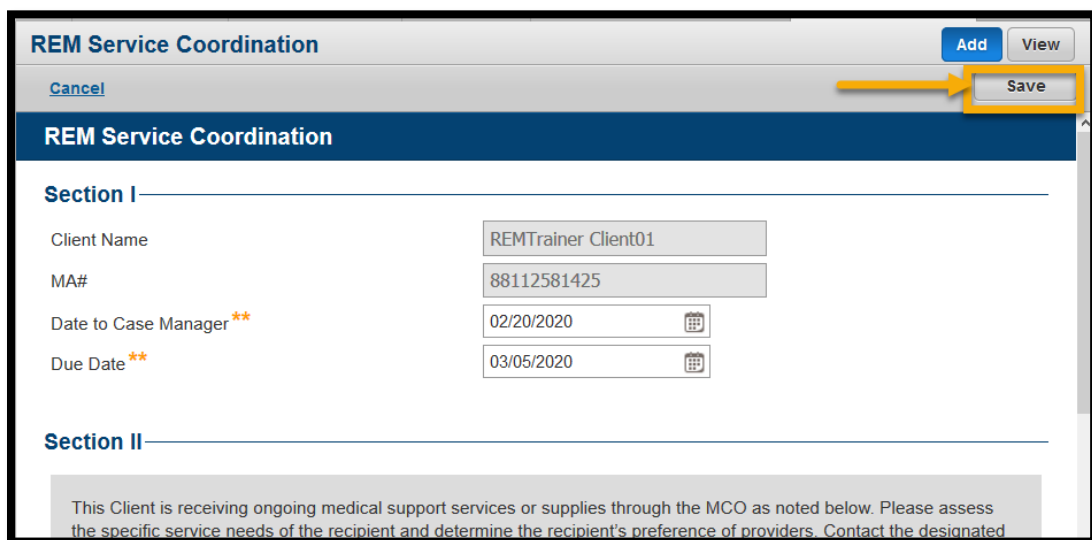


Figure 132 – Save a newly added SCF

- System displays a confirmation message that the newly added form has been saved. The form gets the status of "In Progress." Authorized MDH users can further modify or submit it to the CMA.

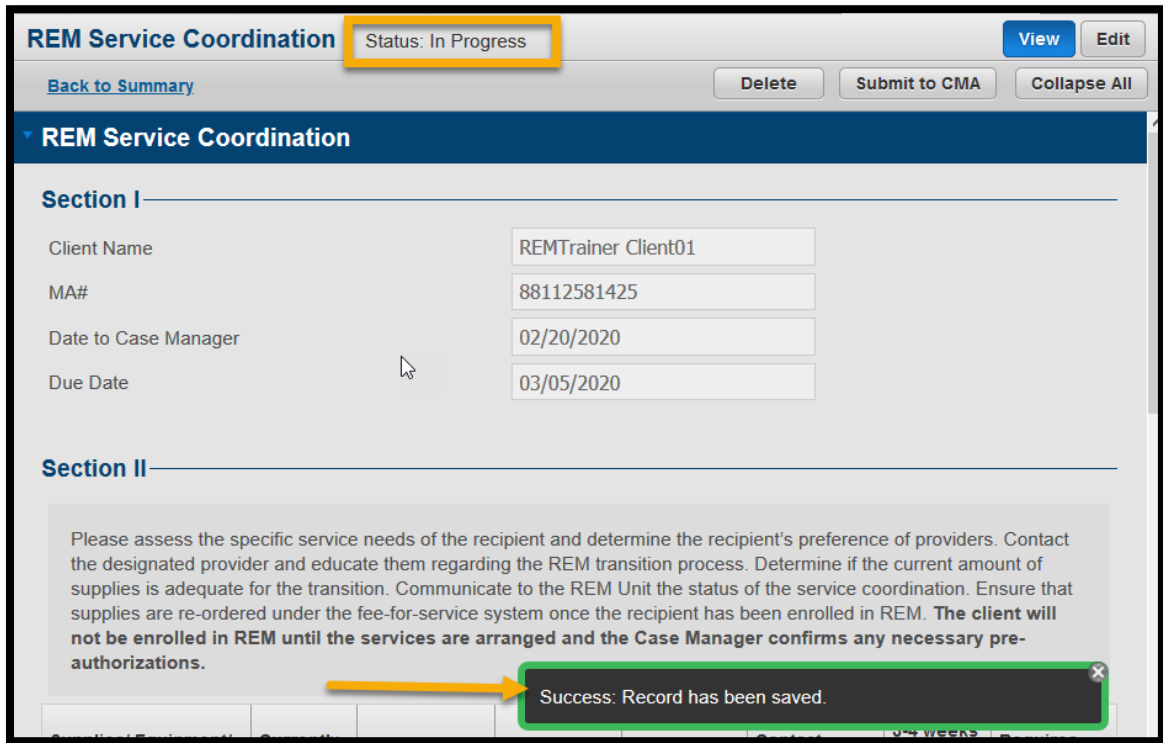


Figure 133 – Confirmation message upon Saving a SCF

NOTE: If a SCF is manually added, section II will not be prepopulated with values from the REM Consent Form. User must manually add the necessary details.

9.3 View Service Coordination Form for a Client

Users can view Service Coordination Form(s) that have been added for a Client. LTSSMaryland presents two options for users – viewing the list of all SCFs for a Client and viewing the details of a single SCF.

Department	Roles
MDH	MDH REM Intake Specialist, MDH REM Administrator, MDH REM Intake Nurse
CMA	CMA REM Administrator, CMA REM Supervisor, CMA REM Case Manager, CMA REM Intake Specialist

Table 11-View Service Coordination Form Primary Actors

9.3.1 View SCF List for a Client

1. When viewing a Client’s profile / relevant details, select the **Programs** banner on the left navigation pane.
2. Select **REM Service Coordination** option
3. System displays **REM Service Coordination – List** page, with a list of Service Coordination Forms, their current status, and other key details as shown in the figure below.

Create Date	Last Modified By	Last Modified Date	Status	Due Date	Actions
02/20/2020	MDH, REM Admin	02/21/2020	Completed	03/05/2020	View Print
02/20/2020	MDH, REM Admin	02/20/2020	Discarded	03/05/2020	View Print
01/30/2020	MDH, REM Admin	02/20/2020	Discarded	02/13/2020	View Print
01/27/2020	Wood, Ella	01/30/2020	Discarded	02/12/2020	View Print

Figure 134 – REM Service Coordination List for a Client, when viewed as a CMA user

NOTE: The list page will be blank if there are no saved SCFs for the Client.

9.3.2 View details of a SCF

To view the details of any SCF for a Client:

1. Go to the **REM Service Coordination – List** page for the Client
2. Select the **View** hyperlink for the desired form

3. System displays the form in View mode

REM Service Coordination Status: Completed [View](#)

[Back to Summary](#) Collapse All

REM Service Coordination

Section I

Client Name: REMClient103 Training

MA#: 88112581003

Date to Case Manager: 02/20/2020

Due Date: 03/05/2020

Section II

Please assess the specific service needs of the recipient and determine the recipient's preference of providers. Contact the designated provider and educate them regarding the REM transition process. Determine if the current amount of supplies is adequate for the transition. Communicate to the REM Unit the status of the service coordination. Ensure that supplies are re-ordered under the fee-for-service system once the recipient has been enrolled in REM. **The client will not be enrolled in REM until the services are arranged and the Case Manager confirms any necessary pre-authorizations.**

Supplies/ Equipment/	Currently	Contact	3-4 weeks	Requires

Figure 135 – REM Service Coordination Form in View mode

NOTE: The workflow history section for the form is available at the bottom of the page. It displays the status changes that the form went through, the user that caused the status change, and the date on which the action was performed on the form.

REM Service Coordination Status: Completed [View](#)

[Back to Summary](#) Expand All

REM Service Coordination

Workflow History

Action	By	Date	From Status	To Status	Comments
Submit to CMA	MDH, REM Admin	02/21/2020	In Progress	Pending CMA	
Submit to REM Unit	MDH, REM Admin	02/21/2020	Pending CMA	Pending REM Unit Review	
Complete	MDH, REM Admin	02/21/2020	Pending REM Unit Review	Completed	

Figure 136 – Workflow history section of a Service Coordination Form

9.4 Modify Service Coordination Form

Modifying a SCF includes the tasks of editing, saving, and submitting it. Since SCF has a workflow that involve various user roles modifying it in different stages, this section has been sub-divided into separate parts, with each part explaining that stage in the workflow and the user roles responsible for that stage.

9.4.1 Stages in the workflow and Actions

At each status of the workflow, the responsibility of modifying and submitting the form to the next step lies with either CMA or MDH roles.

Current Status of the Form	Agency that modifies the form	Action to happen in this status
In Progress	MDH (REM Unit)	MDH Edits and Submits the form to CMA
Pending CMA Review / Overdue CMA	CMA	CMA Edits and Submits the form to REM Unit for review.
Pending REM Unit Review	MDH (REM Unit)	MDH Reviews the form and completes it / sends it to CMA for clarification.
Clarification Requested	CMA	CMA updates the form / provides clarifications and submits the form back to MDH for review.
Completed	N/A (<i>final status of the form</i>)	Users can view, print, or discard the form.

Figure 137-CMA Service Coordination Workflow Table

Users responsible for editing the form can do so by:

1. Navigating to the **REM Service Coordination – List** page for the Client and selecting Edit or
2. By selecting View for the desired SCF from **REM Service Coordination My List** page and selecting Edit on the SCF

This section explains all the user actions using method #1. For additional details on accessing the My List page and using it, please refer to REM Service Coordination My List in this user manual.

9.4.2 MDH Edits and Submits Form to CMA

Once a SCF is created, users with MDH role will work on the form first. They have the option to save and edit it as many times as needed and then submit it to the CMA.

Department	Roles
MDH	MDH REM Administrator, REM Intake Nurse

Table 12—Service Coordination Form MDH Edits/Submits- Primary Actors

To edit a form in “In Progress” status:

1. Go to the **REM Service Coordination – List** page for the Client
2. Select the **Edit** hyperlink for the form

Create Date	Last Modified By	Last Modified Date	Status	Due Date	Actions
01/30/2020	Wood, Ella	01/30/2020	Pending CMA	02/13/2020	View Edit Print

Figure 138- SCF List page: Option to Edit a SCF

3. System displays the form in edit mode
4. Update the fields as needed and select **Save**. The form gets “In Progress” status. (You can again edit the form by following the above steps, if needed.)

REM Service Coordination Status: In Progress

Cancel Edit View Save

REM Service Coordination

Section I

Client Name: LOC_Alert3 Test

MA#: 15975328465

Date to Case Manager**: 12/31/2019

Due Date**: 01/14/2020

Section II

This Client is receiving ongoing medical support services or supplies through the MCO as noted below. Please assess the specific service needs of the recipient and determine the recipient's preference of providers. Contact the designated provider and educate them regarding the REM transition process. Determine if the current amount of supplies is adequate for the transition. Communicate to the REM Unit the status of the service coordination. Ensure that supplies are re-ordered under the fee-for-service system once the recipient has been enrolled in REM. The client will not be enrolled in REM until the services are arranged and the Case Manager confirms any necessary pre-authorizations.

[Add Row](#)

Supplies/ Equipment/ Specialty Pharmacy Services/	Currently Using Service	Designated Provider	MA Provider #	Phone Number	Contact Person's Name	3-4 weeks of supplies on hand?	Requires Pre-Authorization	Actions
Suction Catheters								

Comments:

Figure 5-Save a Service coordination Form

NOTE: The fields denoted with an asterisk** indicates a field required to **Submit** the form.

- Once all updates have been made to the form, click **Submit to CMA** button.

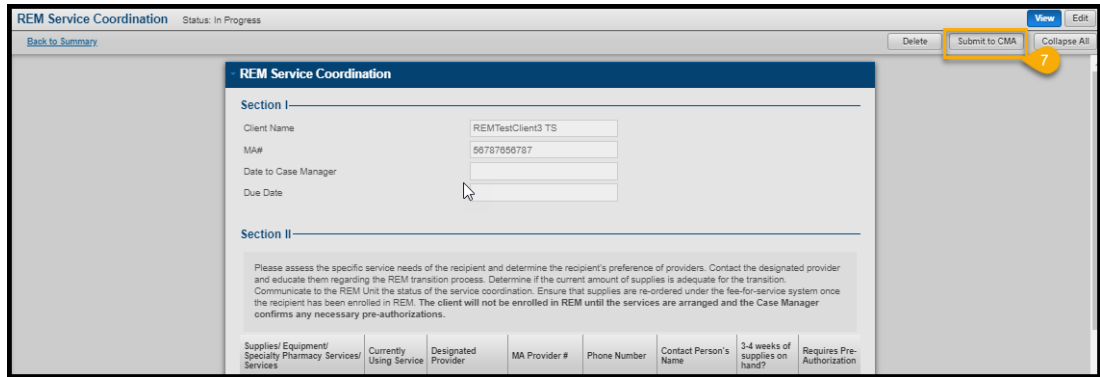


Figure 5-Submit a Service coordination Form to CMA

- System changes the status of the form to **Pending CMA** and sends an alert to the CMA Intake Specialist.

9.4.2.1 Alert for CMA users to work on the SCF

When the form gets the status of “Pending CMA”, an alert is sent to CMA Intake Specialist. Alerts are grouped by Client, so that it’s easy for users to see what alerts are applicable for each Client.

Department	Roles
CMA	CMA Intake Specialist

Table 13-Alert for CMA Users Work on the SCF

To view alerts as a CMA intake specialist:

- Login to LTSSMaryland
- Click on the **Alerts** Tab
- Click on the alert “Service Coordination From has been submitted for CMA Review” for the desired Client

- The alert message is a hyperlink. Upon selecting the message, system displays the **Service Coordination Form - List** page for the Client.

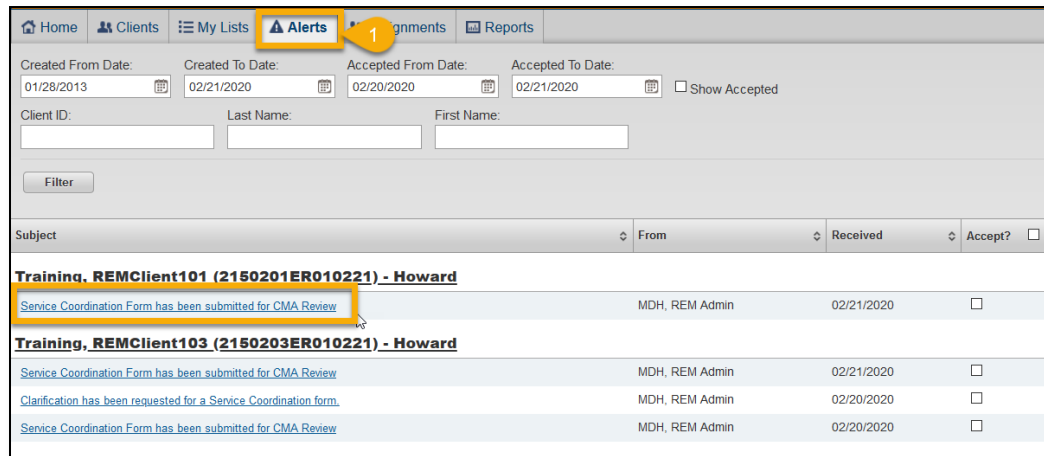


Figure 139- Alert message stating SCF Submitted for CMA Review

9.4.3 CMA edits and submits to MDH REM Unit

Users with CMA roles update SCF for their Clients that are in the status of “Pending CMA”. They update Section II and Section III of the form and submit it to MDH REM unit for completion.

Section II will be prepopulated with any services entered in the linked REM Consent Form. Users can add more Services to this section, if needed.

Primary Actors: CMA Roles: CMA REM Administrator, CMA REM Supervisor, CMA REM Case Manager, CMA REM Intake Specialist.

9.4.4 Update Section II

To edit a SCF in status of “Pending CMA” for a Client:

- Go to the **REM Service Coordination – List** page for the Client.

- Select the **Edit** hyperlink for the form. System displays the form in Edit mode.

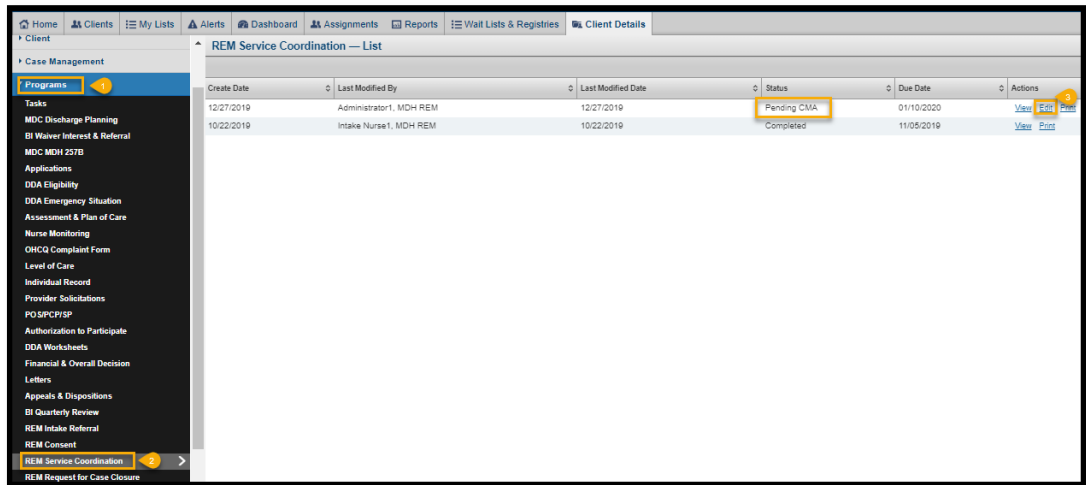


Figure 140- SCF List page: Option to Edit a SCF

- Enter details into the Section II of Service Coordination Form:
 - Click on the **Add Row** hyperlink to add a service
 - Select the **Type of Service** from the dropdown
 - Select **Currently using service** field as “Yes” or “No”
 - Click on the **Search** button next to Designated Provider field and choose a provider
 - MA provider # and phone number are populated
 - Enter contact person’s Name
 - Select **3-4 weeks of supplies on hand** field as “Yes” or “No” or “Not needed”
 - Select **Pre-Authorization** field as “Yes” or “No”
 - Add comments and click **Save** button. (**NOTE:** This button will be renamed as “Add” in the future.)

The service gets added to the list in Section II.

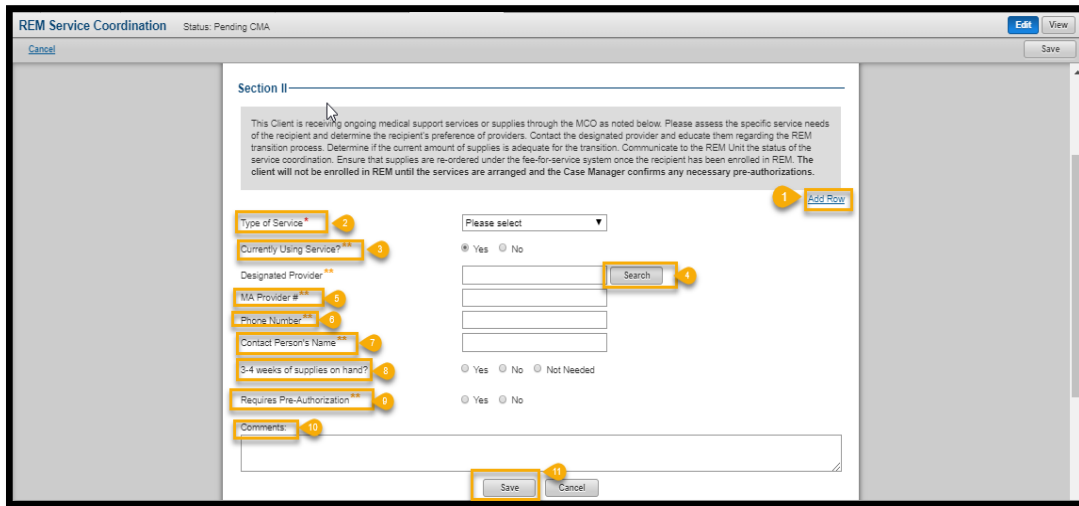


Figure 141- Editing SCF – Add a new row to Section II

- **Search:** Provider search action will be available in various sections of the REM Service Coordination Form as applicable.
 - Upon clicking on the Search button, the system displays the Provider Search Pop-up Window for the user to select a provider from.
 - User can search by Provider Name, Provider Number, Provider Type and County.
 - The user can filter the generated list further from the bottom right “Filter All Columns” field based on name, phone number, type, or county.

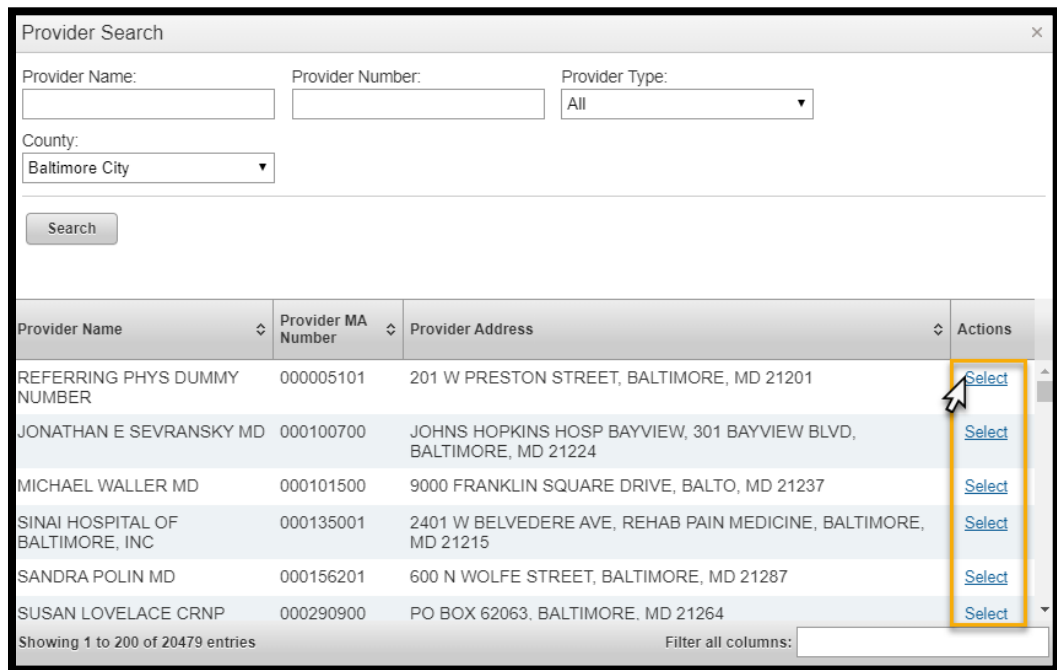


Figure 11-Section I. Specialist/Specialty Clinic (Select search result)

4. Upon selecting a Provider from Provider Search Window, system pre-populates the relevant information in the Section fields.

The screenshot shows a web-based form titled "REM Assessment" with a sub-section "I. Specialist/Specialty Clinic". The form includes the following fields and controls:

- Navigation:** "Back to Summary", "Cancel", "Save & Previous", "Save & Next", "Save", "View", "Edit".
- Section Header:** "I. Specialist/Specialty Clinic".
- Specialist/Specialty Clinic Provider:**
 - List of previously selected providers: [Dropdown menu]
 - Name: ** [Text field: REFERRING PHYS DUMMY ...] [Search button]
 - Provider Number: ** [Text field: 000005101]
 - Address: [Text area: 201 W PRESTON STREET, BALTIMORE, MD 21201]
 - Phone Number: [Text field: (000) 000-0000]
 - Specialty: ** [Text field: Unknown]
 - Frequency of Visits: ** [Text field: Monthly]
 - Last Appt.: [Radio buttons: Exact Date, Approximate Date]
 - Next Appt. Date: [Radio buttons: Due, Scheduled]
 - [Save button (highlighted)] [Cancel button]

Figure 12-Section I. Specialist/Specialty Clinic (Complete entry)

5. Upon clicking on Table Save, system populates the information entered to the table.
6. If the user adds another row, system will display a field "List of previously selected providers."
7. This field will Display all the providers selected previously in this section to help the user select them from the dropdown.
8. If the entries in the table need to be edited, click on the Edit hyperlink for the relevant entry. Update the values as necessary and click Save to store the values to the list.

NOTE: This button will be renamed as "Add" in the future.

- Click **Save** once the values are entered. The form will continue to remain in “Pending CMA” status. You can further edit the form by following the above steps, if needed.

Figure 142- Editing SCF – Edit Values Listed in Section II

9.4.4.1 Update Section III - CMA Supervisor Approval and Submission

A CMA Supervisor must review and approve the SCF before submitting it to the REM unit for review. This is documented by a response to the question 'Was this form reviewed and approved by the supervisor?' in Section III.

- Editing section III of a SCF:
 - Select the value Yes or No for the field “Was this form reviewed and approved by supervisor?”

NOTE: Response to the field 'Was this form reviewed and approved by the supervisor' should be Yes for the form to be submitted to MDH. System displays an error message when submitting the form, if the value selected is “No” .

 - System prepopulates with the field “Person Completing the form” with name of the staff who last edited this form in “Pending CMA” or “Clarification Requested” status.
 - Fill in the Specify text box.
 - NOTE: Name of the reviewing supervisor must be documented in this box.
 - Fill in comments in the comments text box
 - Click Save to save the values added to the form

- Once all the updates are done to the fields in Section II and Section III, select **Save**. The form will continue to remain in “Pending CMA” status. You can further edit the form by following the above steps, if needed.

Figure 143- Editing SCF: Section III

2. When values have been entered and saved for all required fields in Section II and Section III, click on **Submit to REM Unit** button.
 - Upon submission without any error message, system displays the message: “Success: Record has been saved.”

- Status changes to “Pending REM Unit Review”

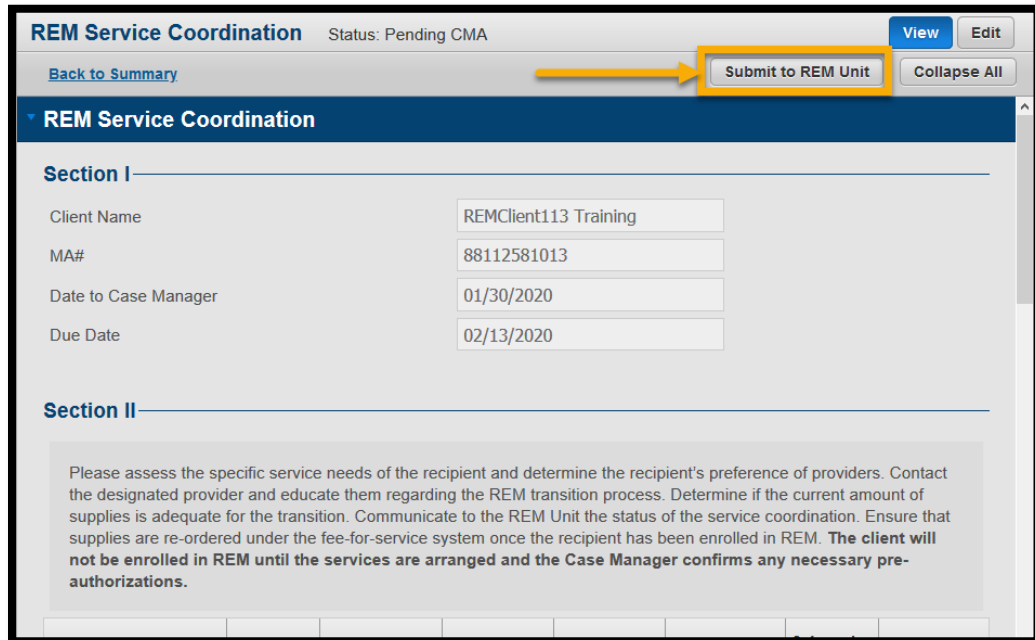


Figure 144- Submit SCF to REM Unit for Review

9.4.4.2 Edit and Submit an Overdue SCF

A Service Coordination Form that has not been submitted for REM Unit Review by the Due Date Captured in Section I of the form will be labeled with the status of “Overdue CMA”. To edit an Overdue SCF, follow the same steps as editing a form in “Pending CMA” status.

NOTE: System sends an alert to CMA Intake Specialist and Client’s assigned CMA REM Case Manager if the SCF form is not submitted by the 10th day of the date specified in the field “Date to Case Manager”

9.4.5 MDH Reviews Service Coordination Form

Service Coordination Forms that are submitted to MDH will have the status of “Pending REM Unit Review”. REM unit uses the section II of SCF to gather information from the Case Management Agency about the specific service needs of the Client, the Client’s preference of providers and if they are a fee-for-service provider, and if the Client has enough supplies for the transition into to the REM program.

There are two key outcomes for this review stage:

1. Review and Complete the SCF
2. Request clarification from the CMA (if additional information is needed before MDH can complete the form)

Department	Roles
MDH REM	MDH REM Intake Nurse, MDH REM Administrator

Table 14-REM MDH Reviews SCF Primary Actors

9.4.5.1 Review and Complete the Service Coordination Form:

To edit a form in “Pending REM Unit” status:

1. Go to the **REM Service Coordination – List** page for the Client.
2. Select Edit action on the service coordination form in “Pending REM Unit Review” status

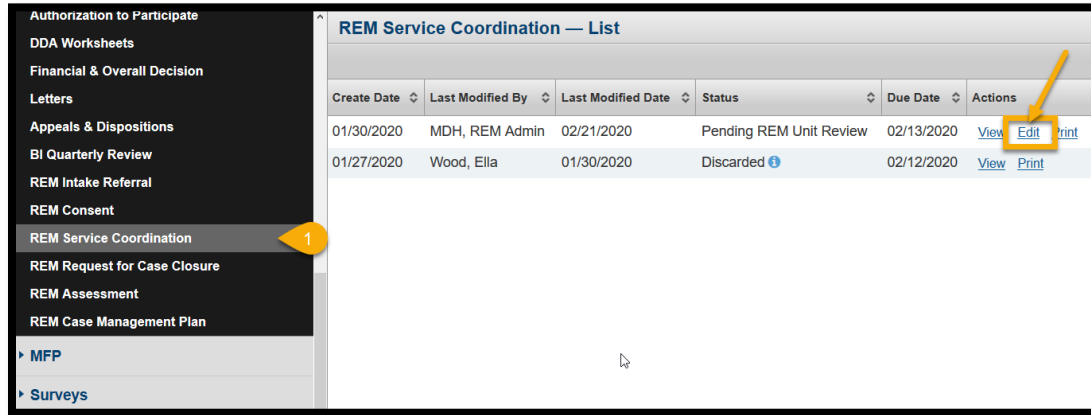


Figure 145- SCF List page: Option to Edit a SCF

3. System displays the form in Edit mode.
4. Review details on the Section II and Section III of Service Coordination Form.
5. Click on the **Complete** button

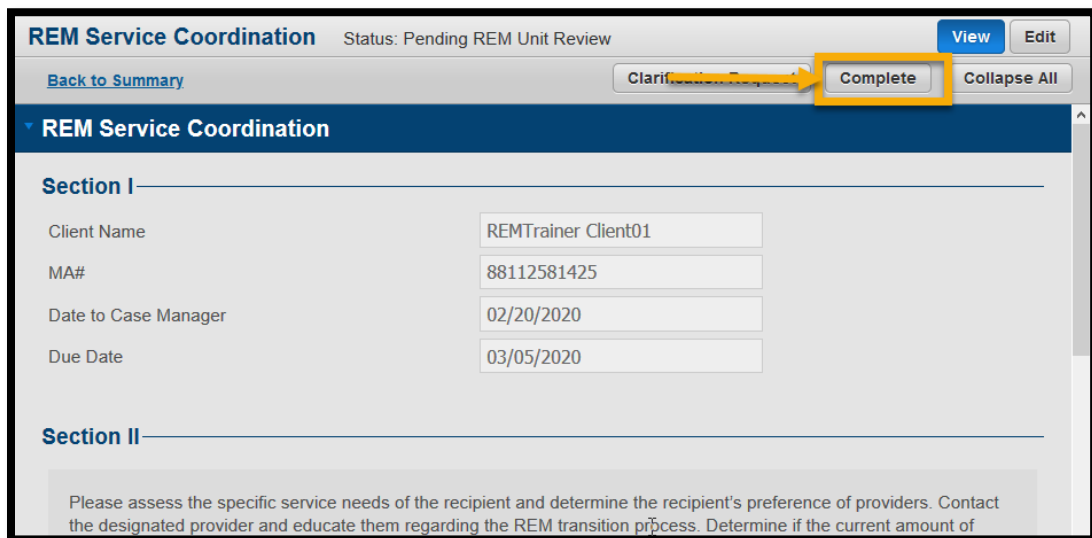


Figure 146- SCF List page: Option to Edit a SCF

6. SCF form receives the status of “**Completed.**”

9.4.5.2 Request Clarification on Service Coordination Form

While reviewing the SCF, MDH may decide that more information is needed before the form can be completed. Or, additional details / services may have to be added to Section II of the form. In such cases, MDH users can send the form back to CMA – Requesting Clarification.

Use the following steps to request clarification on a SCF:

1. Go to the **REM Service Coordination – List** page for the Client.
2. Select View action on the service coordination form in “Pending REM Unit Review” status
3. System displays the form in View mode.
4. Click on the “Clarification Request” button

The screenshot shows the 'REM Service Coordination' form in 'View' mode. The status is 'Pending REM Unit Review'. At the top right, there are buttons for 'View', 'Edit', 'Clarification Request', 'Complete', and 'Collapse All'. The 'Clarification Request' button is highlighted with a yellow box and a yellow arrow. Below the header, there are input fields for Client Name (Tommy Lane), MA# (55555555050), Date to Case Manager (02/13/2020), and Due Date (02/27/2020). Section II contains a paragraph of instructions and a table with columns: Supplies/ Equipment/ Specialty Pharmacy Services/ Services, Currently Using Service, Designated Provider, MA Provider #, Phone Number, Contact Person's Name, 3-4 weeks of supplies on hand?, and Requires Pre-Authorization. The 'Diapers' row shows 'No' for 'Currently Using Service' and 'No' for '3-4 weeks of supplies on hand?'. There is also a 'Comments:' field at the bottom.

Figure 147- SCF Review: Request Clarification

5. Add comments in the Confirmation pop up and click **Yes**

The screenshot shows a 'Confirmation' dialog box. It asks 'Are you sure you want to request clarification?'. Below the question is a text area labeled 'Comment: *' with the text 'Sample comment |'. At the bottom, there is a character limit indicator '15 of 300 character limit' and two buttons: 'Yes' and 'No'.

Figure 148- Confirmation and Enter comments while requesting clarification

6. The form goes to “Clarification Requested” status

9.4.5.3 Alert CMA for Clarification Requested

When the status of the Service Coordination form is updated to “Clarification Requested,” an alert is sent to CMA Intake Specialist and Client’s assigned CMA REM Case Manager.

Department	Roles
MDH	MDH REM Intake Specialist, MDH REM Administrator, MDH REM Intake Nurse
CMA	CMA Intake Specialist, Client’s assigned CMA REM Case Manager

Figure 149- Alert CMA for Clarification Requested

When user clicks on the alert message (which can be found in the alerts tab), system displays the SCF in Edit mode.

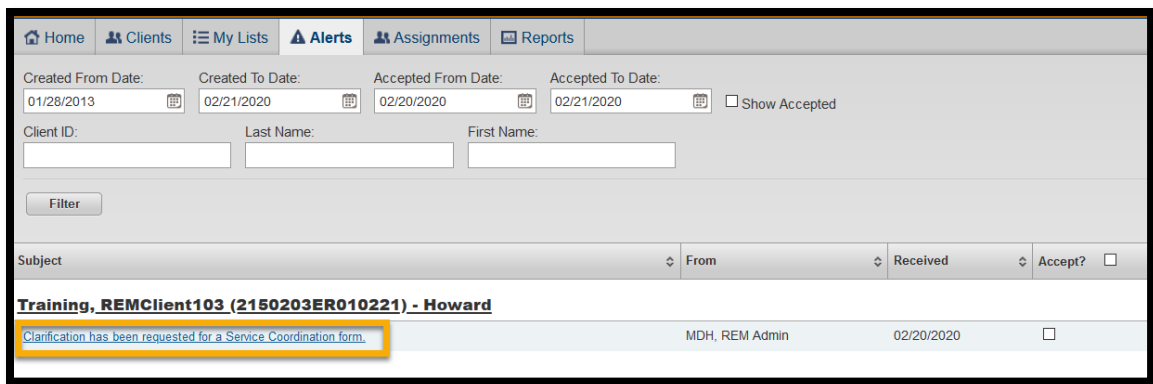


Figure 150- Alert received for SCF Clarification Request

9.4.6 CMA updates SCF with Clarification Requested Status

CMA users can modify SCF with Clarification Requested status.

Department	Roles
MDH	MDH REM Intake Specialist, MDH REM Administrator, MDH REM Intake Nurse
CMA	CMA REM Administrator, CMA REM Supervisor, CMA REM Case Manager, CMA REM Intake Specialist

Table 15-Alert CMA for Clarification Requested

To edit a SCF in status of “Pending CMA” for a Client:

1. Go to the **REM Service Coordination – List** page for the Client
2. Select the **Edit** hyperlink for the form. System displays the form in Edit mode
3. Update relevant details in Section II and Section III of the form, as needed
4. Click **Save**. The form will continue to remain in “Clarification Requested” status. You can further edit the form by following the above steps, if needed.)
5. Once all the changes have been made, click “Submit to REM Unit”.
6. The form gets “Pending REM Unit Review” status. MDH will review the form.

9.5 Delete Service Coordination Form

Users can delete a Service Coordinate Form, if it's in "In Progress" status.

Department	Roles
REM MDH	MDH REM Administrator, MDH REM Intake Nurse

Table 16-Delete Service Coordination Form

To delete a SCF for a Client:

1. Go to the **REM Service Coordination – List** page for the Client
2. Select the **View** hyperlink for the desired form. System displays the form in View mode.
3. Click **Delete** button

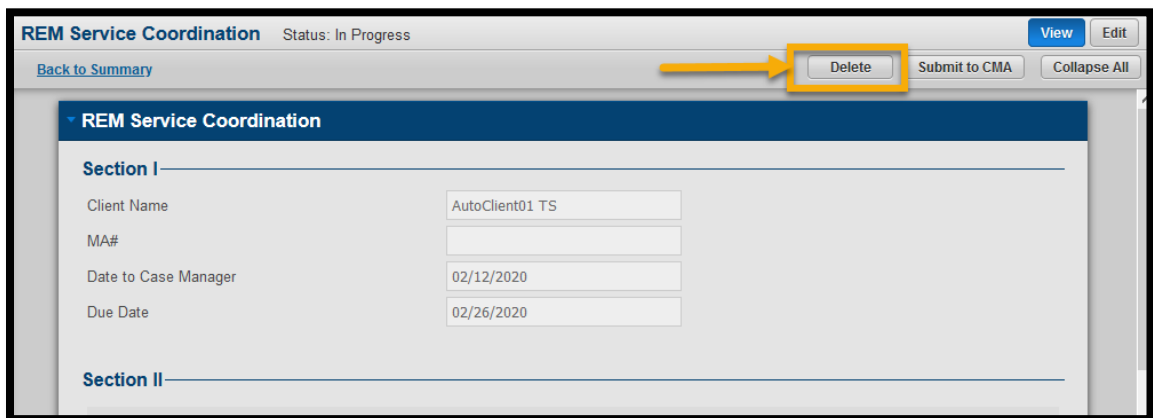


Figure 151- Delete a SCF

4. System prompts for confirmation to delete the form. Click **Yes**.

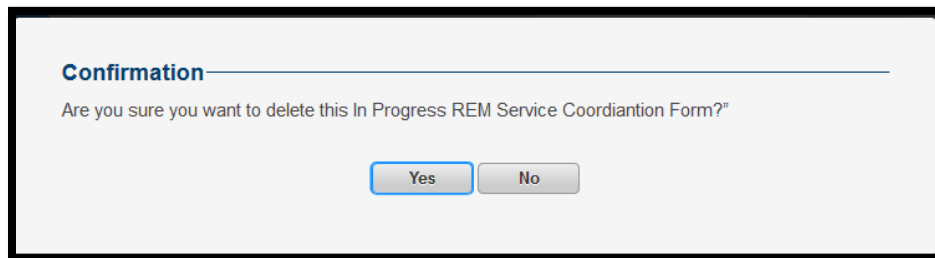


Figure 152- Delete a SCF – Confirmation Prompt

5. System deletes the form and displays a confirmation message

NOTE: Deleted SCFs will not be visible in the system.

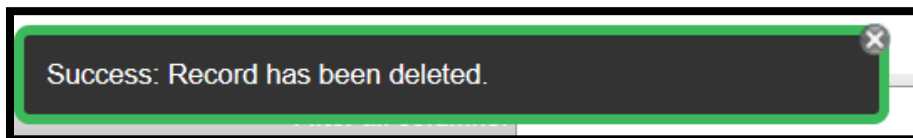


Figure 153- Delete a SCF – Success message

9.6 Discard Service Coordination Form

There are two methods through which a SCF for a Client can be discarded:

1. User manually discards a SCF for a Client, which is in the status of Completed.
2. System automatically discards a SCF once the REM Consent Form linked to it is discarded.

Users can discard a SCF that is in “Completed” status.

Department	Roles
MDH	MDH REM Administrator, MDH REM Intake Nurse

Table 17-Alert CMA for Clarification Requested

NOTE: System does NOT allow users to discard the form in any other status.

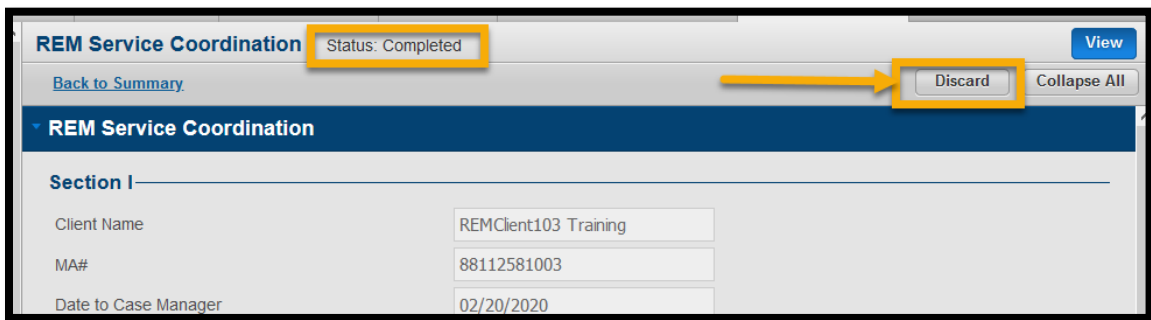


Figure 154- Discard a SCF

9.7 Print Service Coordination Form

9.7.1 Printing a SCF

Each SCF has a dedicated print feature. To print a SCF:

1. Go to **REM Service Coordination – List** page for the Client
2. Select **Print** on the desired form
3. System displays the form in a pdf format that you can use to print / download.

REM Service Coordination — List						
Create Date	Last Modified By	Last Modified Date	Status	Due Date	Actions	
01/30/2020	Wood, Ella	01/30/2020	Pending CMA	02/13/2020	View	Edit Print
01/27/2020	Wood, Ella	01/30/2020	Discarded ⓘ	02/12/2020	View	Print

Figure 155- SCF List page – Options to Print a SCF

9.7.2 Printing the SCF Using Global Print

The global print function available in LTSSMaryland can be used for printing a SCF. When viewing the form:

1. Select **Menu**
2. Then select **Print**
3. System displays the page in a PDF format that you can use to print or download

NOTE: This method will include additional details of the Client in the Print view, which is available on the page but not on the SCF.

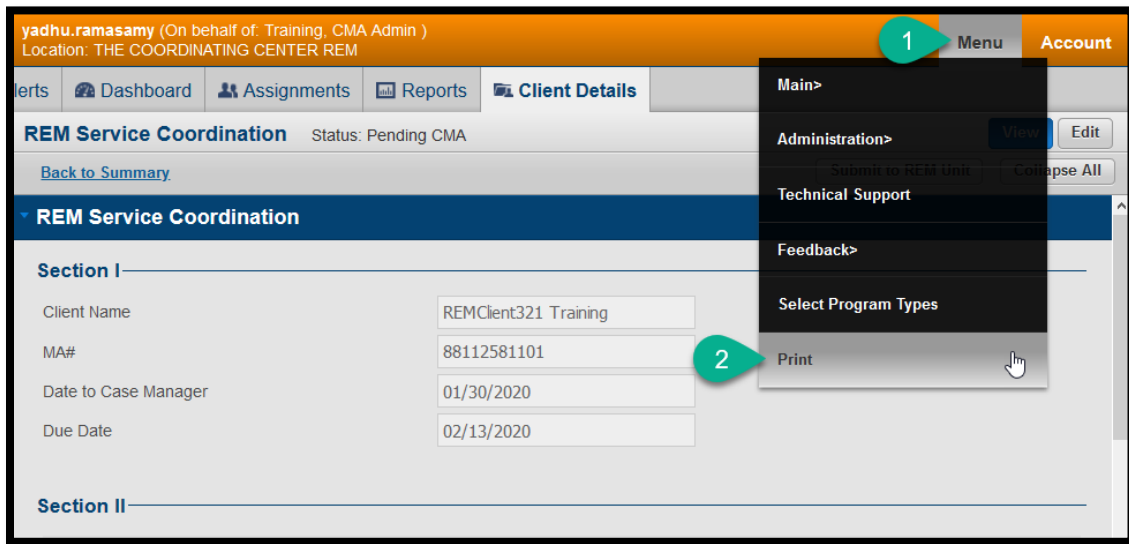


Figure 156- Print a SCF using Global Print option

10 REM Overall Decision Form

The Maryland Department of Health (MDH) uses the Rare and Expensive Case Management (REM) Overall Decision Form (ODF) to document the enrollment status of a REM Client. An approved and active ODF is required before the Client can access REM case management services. Before REM enrollment, the Client must be identified as meeting all the eligibility requirements along with a Client consent to enroll in REM. (See the Consent Form User Manual for more details.)

A REM ODF is created when REM enrollment has been determined to be approved or denied, the Client declines to be enrolled in REM, or when the Client is disenrolled from REM program. These scenarios are described in more detail below:

- **Approve:** Client can be approved for REM enrollment if they have:
 - A REM Intake Referral in “Approved” and “Active” status with a REM Qualifying Diagnosis.
 - A submitted REM consent form with consent to enroll in REM marked as accepted.
 - And if the Client is receiving services with an MCO then a Service Coordination Form is required to be in complete status.
 - The MDH REM Intake Nurse or MDH REM Administrator may now add an “approved” ODF.
- **Deny:** If a Client does not meet qualifying standards for REM Program enrollment during the intake process, an ODF is created with “Denied” decision status. If a Client is denied for enrollment, a denial letter is sent to the Client.
- **Decline:** Client is contacted to get their consent to be enrolled in REM once their REM Intake Referral is approved. However, the Client may Decline to enroll in REM Program, in this condition an ODF is added with a “Declined” status.
- **Disenroll:** A Client can be disenrolled from REM Program for various reasons by adding an ODF with a “Disenroll” status. A disenrollment ODF cannot be added until a REM Case Closure Form has been approved.

NOTE: Based on the enrollment decision a corresponding letter **MUST** be generated, printed and sent.

NOTE: Client must have a CMA REM Case Manager Assigned before enrolling them in REM.

10.1.1 Primary Actors

The following user roles can **Add or Edit or Discard** a REM Overall Decision Form:

Department	Roles
MDH	MDH REM Administrator MDH REM Intake Nurse

Table 18-REM ODF Add Actors

The following user roles can **List or View** REM Overall Decision Form:

Department	Roles
MDH	MDH REM Intake Specialist, MDH REM Administrator, MDH REM Intake Nurse, MDH Admin, MDH Program staff, MDH Program Staff Admin, MDH Program Staff Supervisor MDH Reportable Event Administrator MDH Quality Unit Admin, MDH Quality Unit Staff MDH MDC Admin, MDH MDC Staff, MDH Assessor
POS	POS Unit Staff, POS Unit Supervisor, POS Unit Administrator
Assigned CMA	CMA REM Administrator, CMA REM Supervisor, CMA REM Case Manager, CMA REM Intake Specialist, CMA REM Provider Relations REP

Table 19-REM ODF View Actors

10.2 Adding, Editing and Submitting a REM Overall Decision Form

To Add and submit an ODF, an active REM Intake Referral form must be completed. If the Intake Referral is in “Denied” status, no other completed forms are necessary to create an ODF.

In all other cases, the latest REM Intake Referral must be “Active.” A REM Consent Form must also be linked to the appropriate “Active and Approved” REM Intake Referral while approving or declining or disenrolling.

NOTE: There can be only one “In progress” REM ODF form at a time.

10.2.1 Add/ Edit an Approved, Denied, or Declined Overall Decision Form

1. From the Client Details tab, select **Programs** on the left navigation.
2. Select **Financial and Overall Decision** link on the left-hand panel.

- The system redirects to the Financial and Overall decision – List page. Select **Overall Decision Panel** to expand it to view a list of any existing ODFs.

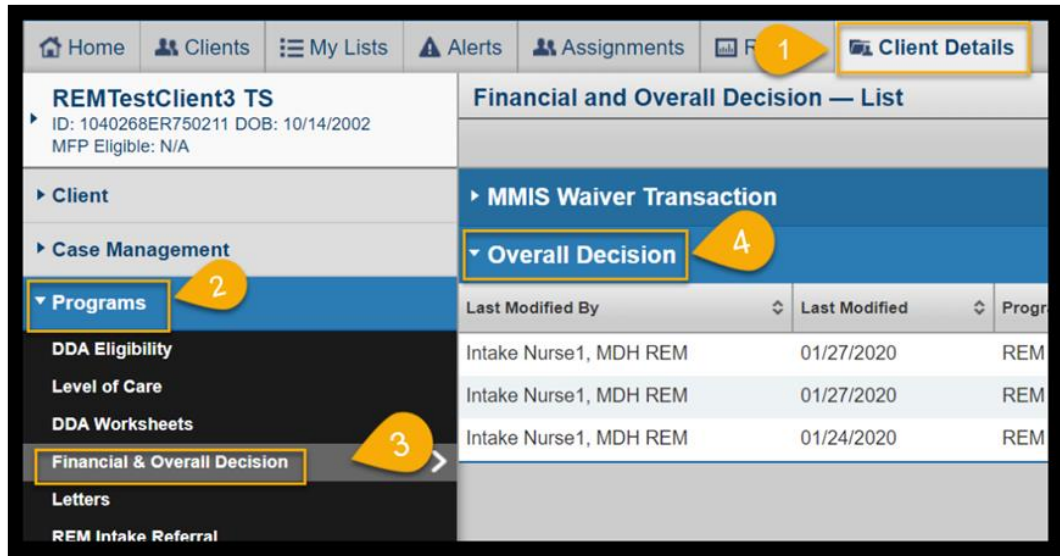


Figure 157-REM ODF Client details page

- Click the **Add** button on the right-hand side of the panel.

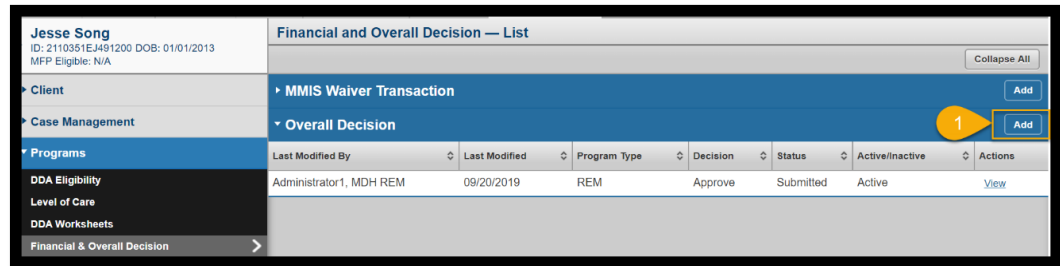


Figure 158-REM ODF list

- System displays a popup box for selecting a program type. Choose **REM** from the dropdown and then click **Ok**.

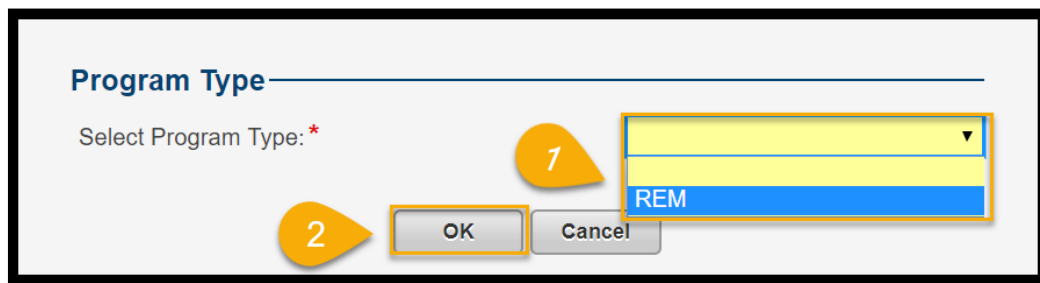


Figure 159-REM ODF select program type popup

- System displays a popup for selecting the overall decision determination. Select **Approve**, **Deny**, or **Decline** as applicable. (For information on disenrolling a Client, see the **Add a Disenroll ODF** section below.) The system will auto-select the Decline toggle if a Consent Form has been submitted with the “Client Consent to Enroll in REM” field set to “Declined.”

Figure 160-REM ODF overall decision popup

- The system displays details of the overall decision determination based on the determination you selected. Enter required details in the REM overall determination form fields. The information required will depend upon the selected “Overall Decision”:
 - Approved:** Upon selecting Approve in “Overall Decision” the following fields will be displayed with REM End Date pre-populated with Client’s Age Out Date.
 - User has the option to modify the REM End Date if needed to any date that marks the end of REM Enrollment Span for the Client. “Special Program Code” and “MCO” fields will be pre-populated based on the REM qualifying Diagnosis captured in the approved and active REM Intake Referral.

- **Denied:** Upon selecting “Deny” in “Overall Decision” field the following fields will be displayed with Denial Date pre-populated to current system date.

The screenshot shows a web form titled "Overall Decision" with a sub-section "Determination". It features three radio buttons: "Approve", "Deny" (which is selected), and "Decline". Below these, the "Denial Date" is pre-filled with "02/23/2020". Other fields include "Denial Reason" (a dropdown menu), "MCO" (set to "Aetna Better Health"), "Notes" (a large text area), "Signature" (set to "MDH, REM Admin"), and "Submission Date" (set to "02/23/2020").

- **Decline:** Upon selecting “Decline” in “Overall Decision” field the following fields will be displayed with Decline Date pre-populated to current system date.

The screenshot shows the same "Overall Decision" form, but with the "Decline" radio button selected. The "Decline Date" is pre-filled with "02/23/2020". The "MCO" field remains "Aetna Better Health", and the "Signature" and "Submission Date" fields remain "MDH, REM Admin" and "02/23/2020" respectively.

8. Select **Save** to record the ODF information.

Figure 161-REM ODF overall decision form

A success message is displayed if the form is created:

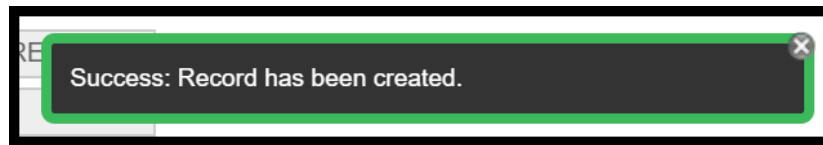


Figure 162-REM ODF record created success message

Click on the **X** button to close the success message.

9. The saved REM Overall Decision Form is displayed in read-only view.
10. User can edit the form again by clicking on Edit link from the List Page or from View Page.

IMPORTANT: Once ODF is submitted the user must print it and send it to the HealthChoice Eligibility Unit.

10.2.2 Submit an Overall Decision Form

1. Select the **Submit** button on the upper-right hand side of the panel.

Figure 163-REM ODF completed record

NOTE: If the ODF record has been successfully submitted, a success message is displayed.

2. Once the ODF is submitted, it will become active if the following criteria meets:
 - Approved, Denied or Declined ODF will become Active if the REM Begin Date is equal to or less than current system date.
3. If an Approve ODF is submitted, system sends an alert to the Client’s assigned CMA Case Manager with a message: Client was approved and enrolled in REM.

IMPORTANT: Once ODF is submitted the user must print it and send it to the HealthChoice Eligibility Unit.

10.2.3 Add a Disenroll Overall Decision Form

To end REM enrollment for a Client, submit a “Disenroll” ODF. The user will not be allowed to create a “Disenroll” ODF unless an approved and active ODF already exists and a REM Request for Case Closure is Approved and Active.

NOTE: Refer to the Request for Case Closure section of this user manual for more details on REM Request for Case Closure.

1. From the Client Details tab, select **Programs** on the left navigation.
2. Select **Financial and Overall Decision** link on the left-hand panel.
3. The system redirects to the Financial and Overall decision – List page. Select **Overall Decision Panel** to expand it to view a list of any existing ODFs.
4. Click the **Add** button on the right-hand side of the panel.

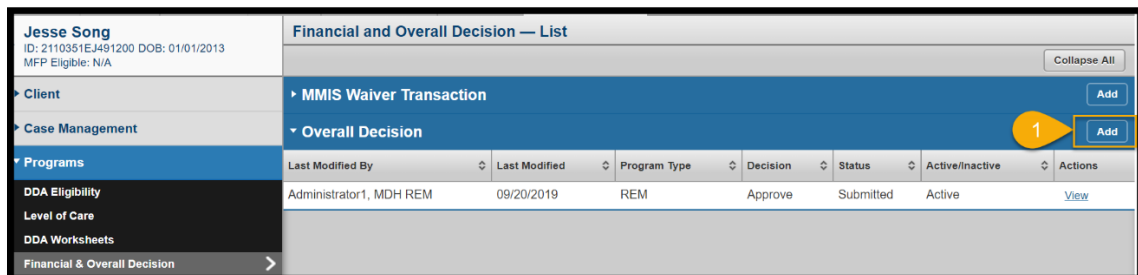


Figure 164-REM ODF List

- System displays a popup box for selecting a program type. Choose **REM** from the dropdown and then click **Ok**.

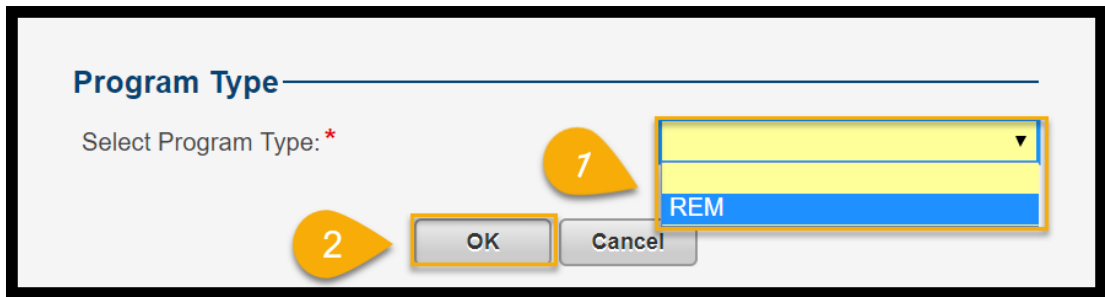


Figure 165-REM ODF Select Program Type Popup

- If disenrolling, system will pre-populate “Disenroll” value in “Overall Decision” field.

NOTE: If an Active and Approved REM ODF is in place, the user will only be able to select the Disenroll option while adding another ODF for REM.
- REM Begin Date and REM End Date will be pre-populated on the Disenroll ODF from the Approved and Active ODF.
- User can modify the REM End Date to current system date or to any date that marks the end of REM Enrollment Span for the Client. Special Program Code will be pre-populated based on the REM Qualifying Diagnosis captured in the approved and active REM Intake Referral.

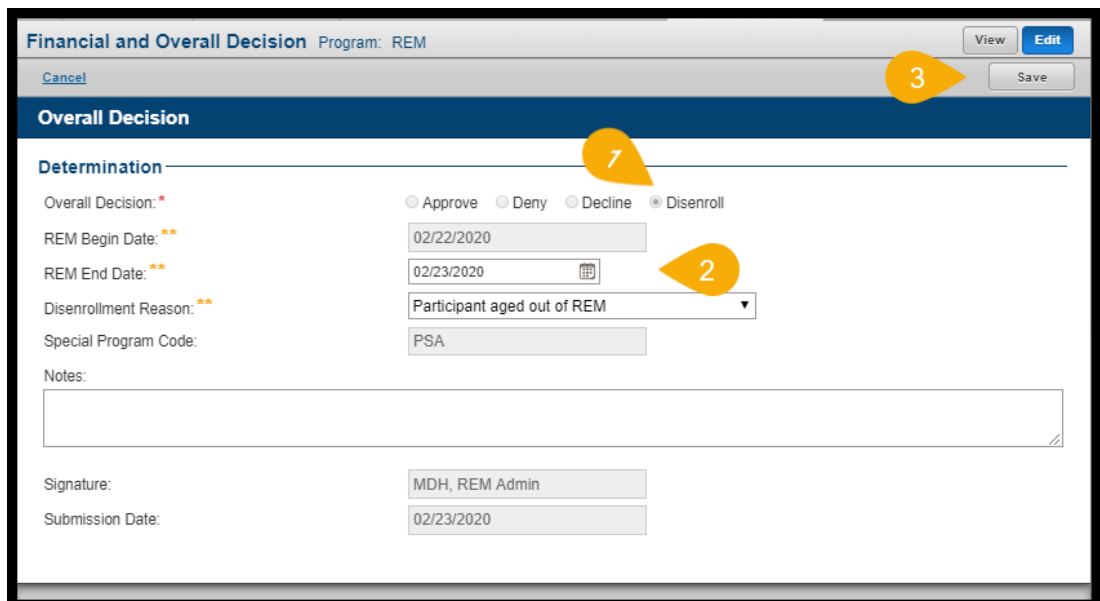


Figure 166-REM ODF Save

9. The saved REM Overall Decision Form is displayed in read-only view.

Important: The Overall Decision Form is not submitted until the user has clicked on the **Submit** button.

10. Select the **Submit** button on the upper-right hand side of the panel to Submit the ODF.

The screenshot shows a web interface for the 'Financial and Overall Decision' form. At the top, it indicates 'Status: In Progress' and 'Program: REM'. There are 'View' and 'Edit' buttons in the top right. Below this is a 'Back to Summary' link and a 'Submit' button, which is highlighted with a yellow callout bubble containing the number '1'. The main section is titled 'Overall Decision' and contains a 'Determination' section with radio buttons for 'Approve', 'Deny', 'Decline', and 'Disenroll' (which is selected). Below these are input fields for 'REM Begin Date' (02/22/2020), 'REM End Date' (02/23/2020), 'Disenrollment Reason' (Participant aged out of REM), 'Special Program Code' (PSA), and a 'Notes' text area. At the bottom, there are fields for 'Signature' (MDH, REM Admin) and 'Submission Date' (02/23/2020).

Figure 167-REM ODF Submit

11. The submitted Disenroll ODF will become Active when the REM End Date Captured in this ODF is equal to or less than = < Current System Date.

12. Activation of a Disenrolled ODF marks the end of enrollment for the Client from REM Program.

13. CMA REM Case Manager will receive an alert upon disenrollment that the Client has been disenrolled from REM.

14. CMA REM Admin will receive an alert upon disenrollment that the access to the Client for their agency will be revoked in 15 days from the REM End Date.

10.3 Discard REM Overall Decision Form

If needed, a REM ODF can be discarded. This action can only be applied to the latest submitted ODF making the previously submitted ODF Active.

A REM ODF can be discarded in “In Progress” or “Submitted” status from the View Page.

Steps to discard a REM ODF:

1. Navigate to the View page of the respective ODF.
2. Click on Discard.
3. System displays a Pop-up confirmation before discarding.

4. Enter reason for discarding and click Yes from the Pop-up. To cancel Discard, click on No.

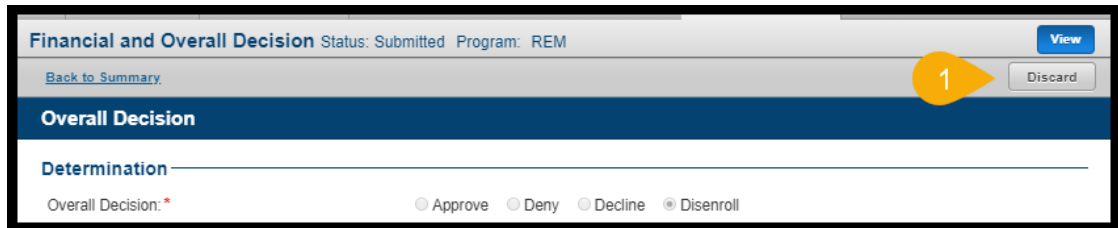


Figure 168-REM ODF Discard

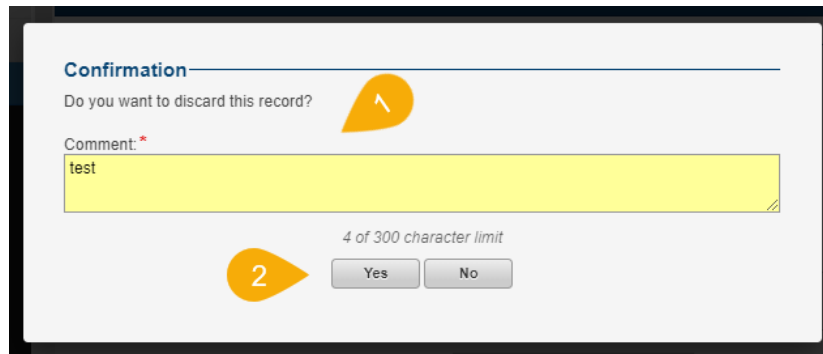


Figure 169-ODF Discard Confirmation

5. System discards the ODF selected and updates the status of the ODF to "Discarded". The info-tip icon displays the comment captured as the reason for discarding.

Important: It is highly recommended to **not Discard** any submitted ODF

11 MMIS Waiver Transaction Form

MMIS Waiver Transaction Form is used to capture the details if correction in Enrollment dates is needed in MMIS. This form will serve the purpose of informational record keeping and for printing to be sent to the HealthChoice Eligibility Unit. This form is generally used when the Client is enrolled in LTSS but has been disenrolled in the Maryland Medicaid Management Information System (MMIS.)

11.1 Primary Actors

The following user roles can **Add** or **Edit** or **Discard** or **Print** a MMIS Waiver Transaction Form:

Department	Roles
MDH	MDH REM Administrator MDH REM Intake Nurse

Table 20-MMIS Waiver Transaction Form - Primary Actors

The following user roles can **List** or **View** MMIS Waiver Transaction Form:

Department	Roles
MDH	MDH REM Intake Specialist MDH REM Administrator MDH REM Intake Nurse MDH Admin, MDH Program Staff, MDH Program Staff Admin, MDH Program Staff Supervisor
Assigned CMA	CMA REM Administrator, CMA REM Supervisor, CMA REM Case Manager, CMA REM Intake Specialist

11.2 Add / Edit a MMIS Waiver Transaction Form

1. Open the profile for the appropriate Client.
2. From the Client details tab, select the **Programs** banner on the left navigation.
3. Select **MMIS Waiver Transaction** to view the list of the existing forms.

4. Select the **Add** button on the right-hand of the MMIS Waiver Transaction heading to create a new MMIS Waiver request.

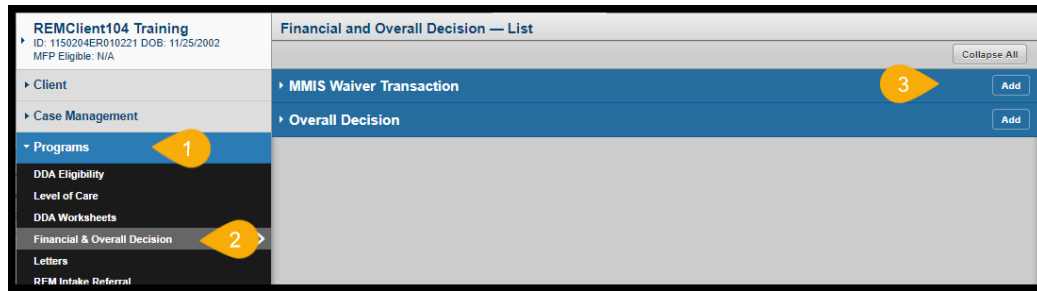


Figure 170-REM MMIS Waiver Transaction Panel View

5. Select **REM** in the Select Program Type dropdown and then select **OK**.

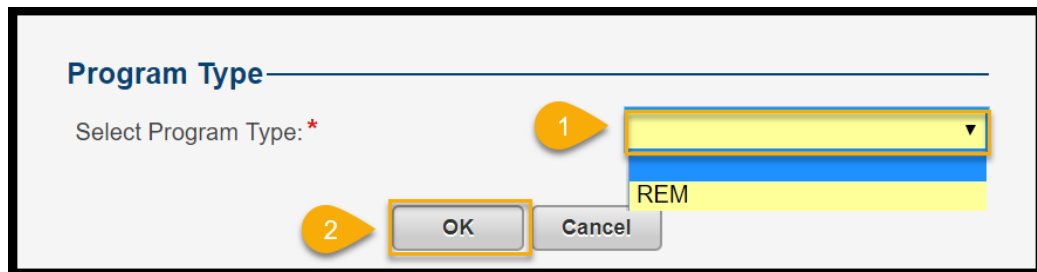


Figure 171-REM MMIS Waiver Transaction Program Type

6. System will navigate the screen to the MMIS Waiver Transaction form edit page.
7. Complete the form and select a reason for adding the MMIS Waiver Transaction Form. Enter supplemental information in the **Comments** field, if applicable. If “other” was selected in the **Reasons** dropdown, explanatory details should be recorded in this field. You may also modify the **REM Begin Date** and **REM End Date** fields.

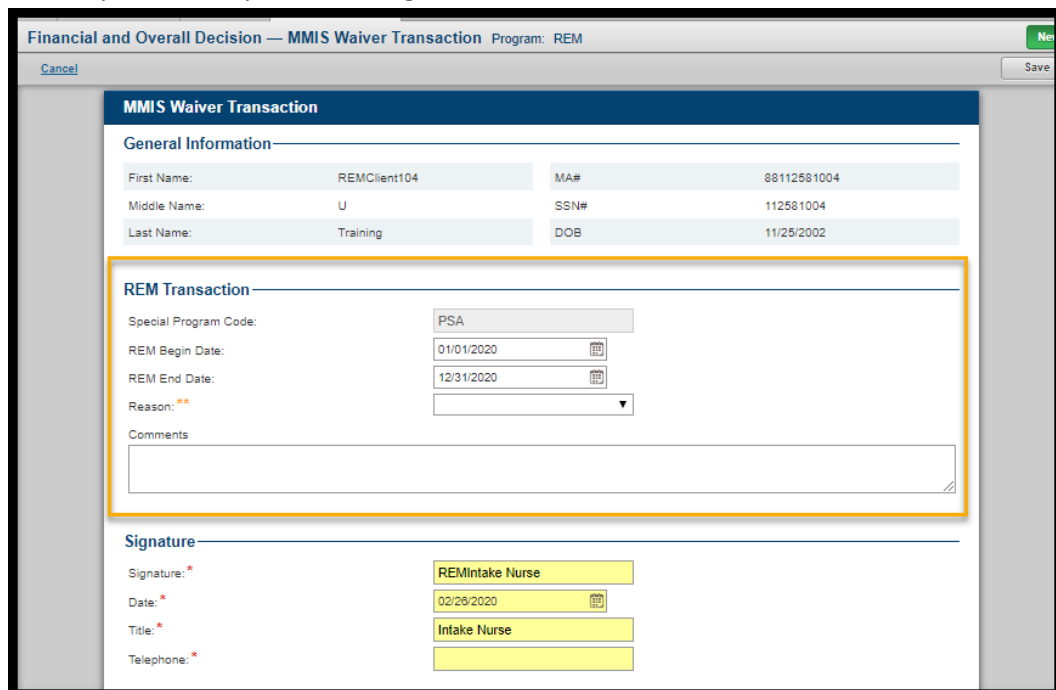


Figure 172-REM MMIS Waiver Transaction Save Form

8. Click on Save, system navigates the screen to MMIS Waiver Transaction Form View page.
NOTE: Fields denoted with double asterisk** indicates the fields required to submit the form.
9. User can edit the form again from the Edit link from List or View Page.

Financial and Overall Decision — List								Collapse All
MMIS Waiver Transaction								Add
Last Modified By	Last Modified	Program Type	Status	Active	Acknowledged By	Acknowledged	Actions	
Intake Nurse1, MDH REM	01/24/2020	REM	In Progress	No	N/A	N/A	View Edit Print	
Intake Nurse1, MDH REM	01/24/2020	REM	Submitted	Yes	N/A	N/A	View Print	

Figure 173-REM MMIS Waiver Transaction Financial and Overall Decision List

10. Select **Back to List** to return to Financial and Overall Decision List.

11.3 Submit a MMIS Waiver Transaction Form

1. Select the **Submit** button on the upper-right hand side of the panel.

Financial and Overall Decision — MMIS Waiver Transaction Status: In Progress Program: REM [View](#) [Edit](#)

[Back to List](#) [Submit](#) [Discard](#)

MMIS Waiver Transaction

General Information

Figure 174-MMIS Waiver Transaction Form Panel

2. System updates the status of the MMIS Waiver Transaction Form to Submitted and navigates back to List Page.

Financial and Overall Decision — List								Collapse All
Financial Eligibility Determinations and Redeterminations								
MMIS Waiver Transaction								Add
Last Modified By	Last Modified	Program Type	Status	Active	Acknowledged By	Acknowledged	Actions	
MDH, REM Admin	02/24/2020	REM	Submitted	Yes	N/A	N/A	View Print	
Overall Decision								Add

Figure 175-View Submitted MMIS Waiver Transaction

3. The system generates a list of MMIS waiver transactions for the selected Client. Beneath the actions column, select **View** the record you'd like to see.

11.4 Print an MMIS Waiver Transaction Form

MMIS Waiver Transaction form can be printed by using the Print link from the List Page.

Important: Please print a submitted MMIS Waiver Transaction Form and send it to the HealthChoice Eligibility Unit.

11.5 Discard an MMIS Waiver Transaction

1. Navigate to the View page of the respective form from the List Page By clicking on View link.

Last Modified By	Last Modified	Program Type	Status	Active	Acknowledged By	Acknowledged	Actions
Intake Nurse1, MDH REM	01/24/2020	REM	Submitted	Yes	N/A	N/A	View Print
Intake Nurse1, MDH REM	01/24/2020	REM	Discarded	No	N/A	N/A	View Print

Figure 176-MMIS Waiver Transaction Form list view

2. Click on **Discard**.

Figure 177-MMIS Waiver Transaction Form discard

3. System displays a Pop-up confirmation before discarding.

4. Enter reason for discarding and click Yes from the Pop-up. To cancel Discard, click on No.

Figure 178-REM MMIS Waiver Transaction Form comments

5. The system will generate a notification indicating that the record has been successfully discarded. Click the **X** to close the popup.

6. System navigates the screen to List Page and displays “Discarded” in status field for the respective MMIS Waiver Transaction Form.

12 MDH REM Request for Case Closure Form

The Maryland Department of Health (MDH) uses the Rare and Expensive Case Management (REM) Request for Case Closure Form to end REM case management services. A REM Request for Case Closure is initiated by CMA and undergoes CMA lead review and approval. Once approved, the Case Closure Request Form is sent to MDH for final review and approval. If necessary, both the CMA lead reviewer and MDH reviewer may send a Clarification Request to request originator. Once approved by MDH, the Case Closure Request is set to Approved and active status.

NOTE: The REM Request for Case Closure does not disenroll the Client from the REM program. To completely disenroll the Client from the REM program, the REM Case Closure Request Form should be followed up with a Disenroll REM ODF.

12.1 REM Request for Case Closure Workflow

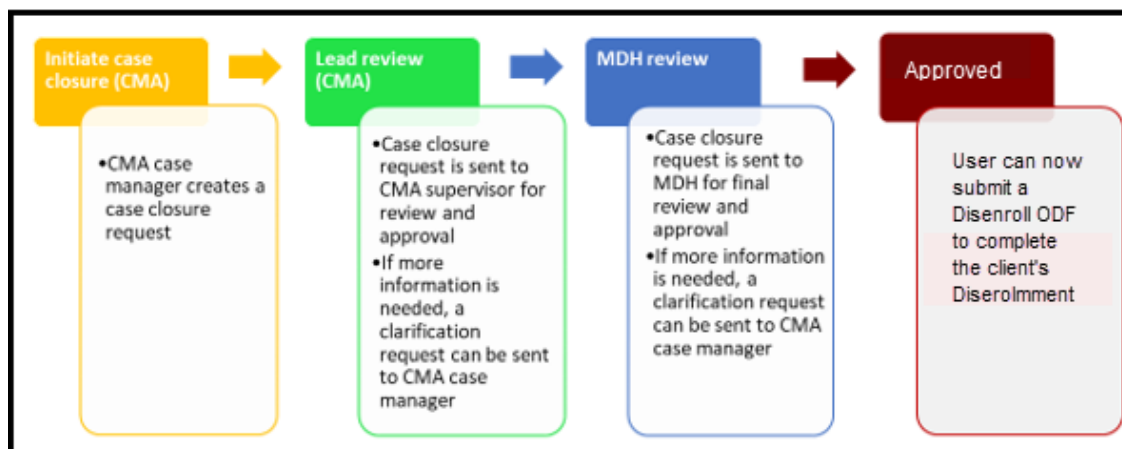


Figure 179-REM Case Closure Workflow

As the REM Case Closure Request form progresses through the workflow through final approval, the form moves through multiple statuses. The following is a description of REM Case Closure Request form workflow statuses:

- **In Progress:** The request has been initiated by CMA
- **Pending Lead Review:** The request has been submitted for CMA supervisor review
- **Clarification Requested:** A clarification Request has been created by either the CMA Lead or the MDH reviewer.
- **Pending MDH review:** The request has been approved by the CMA Lead Review, and is now awaiting final approval by REM MDH
- **Approved:** The REM Case Closure Request has been approved by MDH
- **Denied:** The REM Case Closure Request has denied by MDH
- **Discarded:** An "In progress" or "Pending Lead Review" status REM Case Closure Request may be discarded, which completes the process without making a final determination

12.2 Initiate REM Case Closure Request (Add)

12.2.1 Primary Actors

Department	Roles
MDH	MDH REM Intake Nurse, MDH REM Administrator
CMA	CMA REM Case Manager from Assigned CMA

Table 21-Add REM Case Closure Request Primary Actors

Follow these instructions to initiate a REM Case Closure Request:

1. From the Client Details tab, select the **Programs** banner on the left navigation pane.
2. Select **REM Request for Case Closure**.
3. The system navigates the screen to **REM Request for Case Closure - List** page. Select the **Add** button on the upper right-hand side of the panel.

NOTE: If a Request for Case Closure form is already In Progress, this button will not be visible.



Figure 180-REM case closure request list

4. The system generates an in-progress REM Request for Case Closure form in edit view. Select the **Save** button on the upper-right hand side of the REM Request for Case Closure Edit Page. To the extent that information is available, REM Case Closure Summary fields should be completed. This will prevent the request from being returned via the Clarification Request process.

NOTE: Fields denoted with a double asterisk** are required.

- Upon save, the system will navigate the screen to the view page of the form.

Figure 181-REM Case Closure Request Details

This system will generate a success message, confirming that the record has been saved.

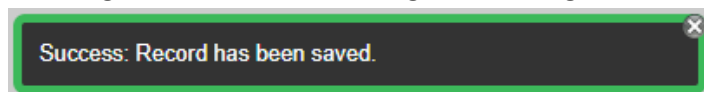


Figure 182-REM Case Closure Success Message

- Select the **Submit for Lead Review** button from the view page. To review the form contents or the workflow history, select on the right arrows on the appropriate panel.

Figure 183-REM Case Closure Submit for Lead Review Button

- The request is submitted to the CMA REM Supervisor.
- An Alert "REM Case Closure is ready for your review" is sent to the Supervisor selected in the form.

12.3 CMA Lead Review

Once a REM Case Closure Request has been created, REM CMA Case Manager completes and submits it for CMA Lead Review.

12.3.1 Primary Actors

Department	Roles
CMA	CMA REM Supervisor, CMA REM Administrator
MDH	MDH REM Administrator

Table 22-REM CMA lead review Primary Actors

1. From the Client Details tab, select the **Programs** banner on the left navigation.
2. Select **REM Request for Case Closure**.
3. The system navigates to the REM Request for Case Closure List. Select the **View** hyperlink under the Actions column.

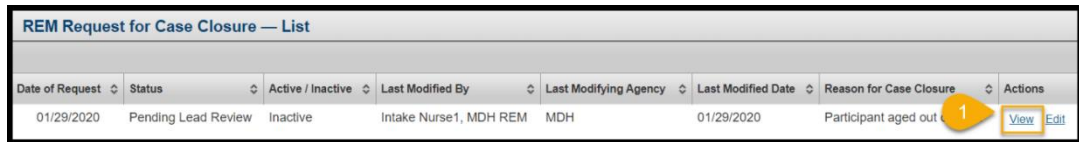


Figure 184-REM CMA Closure Request View

NOTE: To make changes to a REM Request for Case Closure form, select the **Edit** button. This will generate the form in edit view, allowing the user to update the form. The user can select a different user to review the request in the Supervisor to Review dropdown. Select **Save** to retain your changes.

4. The system will generate the form in read-only view. To approve the request, select the **Submit for MDH Review** button. This completes the lead review; the form will be changed to “Pending MDH review” status and submitted to MDH.

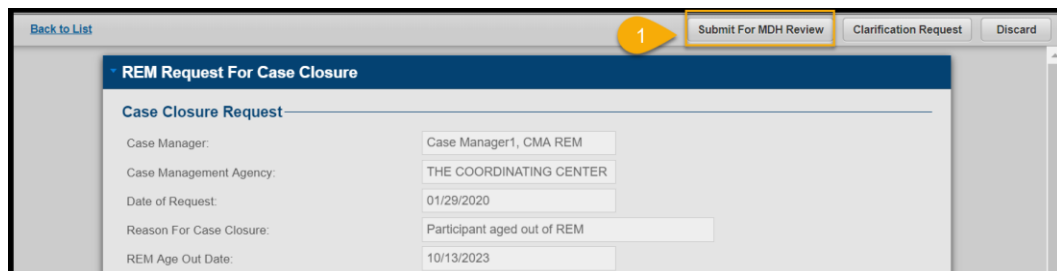


Figure 185-REM CMA Closure Request Submit for MDH Review

5. The system will generate a success message, confirming that the request has been submitted.

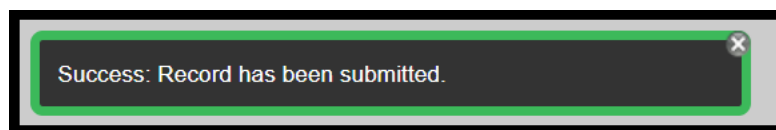


Figure 186- REM CMA Success Message

NOTE: There are two additions options for routing the closure request:

- **Clarification Request:** This button requests additional information from the form originator. Select the button generates a comment popup. Describe the clarification needed to process the request then select **Yes**. The request is returned to the MDH REM administrator. A Clarification Request can only be submitted if the case is in “Pending Lead Review” or “Pending MDH Review” status.
- **Discard:** Selecting this button ends the REM Case Closure process without submitting it to final review. Selecting **Discard** generates a comment button. Enter the reason for discarding the request and select **Yes**.

12.4 MDH Review

Once the Case Closure Request has been approved by the CMA supervisor, it is submitted to the MDH REM Administrator for final determination.

12.4.1 Primary Actors

Department	Roles
MDH	MDH REM Administrator

Table 23-MDH review Case Closure Request Primary Actors

1. From the Client Details tab, select the **Programs** banner on the left navigation pane.
2. Select **REM Request for Case Closure**.
3. The system will navigate to the REM Request for Case Closure List. Select the **View** hyperlink under the Actions column.

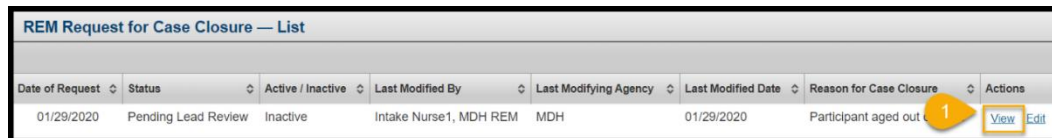



Figure 187-MDH REM Request for Case Closure List

NOTE: To make changes to a REM Request for Case Closure form, select the **Edit** button. This will generate the form in edit view, allowing the user to update the form. The user can select a different user to review the request in the Supervisor to Review dropdown. Select **Save** to retain your changes.

6. The system opens the form in read-only view. To approve the request, select the **Approve** button. To review the form contents or the workflow history, select on the right arrows  on the appropriate line.

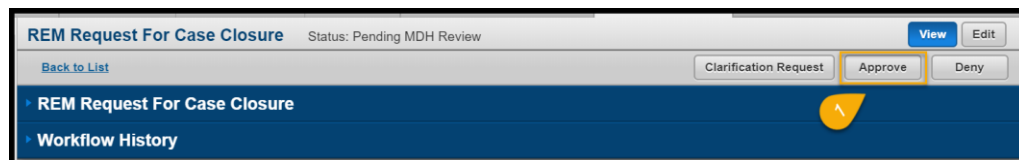


Figure 188-MDH REM Case Closure Request Approve

- The system will generate a popup confirming the approval; enter comments and then select **Yes**. This completes the process of closing REM Case Management services for the Client.

Figure 189- MDH REM Success Message

The system generates a success message, confirming that the request has been submitted. Select **Back to List** hyperlink to return to the REM Case Closure Request Form– List.

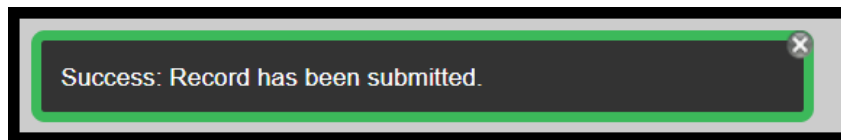


Figure 190- MDH REM Success Message

NOTE: There are two additions options for routing the Case Closure Request:

- **Clarification Request:** This button requests additional information from the form originator. Select the button generates a comment popup. Describe the clarification needed to process the request then select **Yes**. The request is returned to the MDH REM administrator. A Clarification Request can only be submitted if the case is in “Pending Lead Review” or “Pending MDH Review” status.
- **Deny:** This button denies the REM Request for Case Closure. Select Deny. The system will generate a comment button. Enter the reason for discarding the request and select **Yes**.

NOTE: Once the REM Request for Case Closure form is approved, it also becomes Active and remains active until the REM Disenroll ODF is submitted. To Deactivate the REM Request for Case Closure manually select the **Deactivate** button on the upper-right hand side of the REM Request for Case Closure View Page. This is an optional function and is only available to MDH REM Administrator.

12.5 Edit a REM Request for Case Closure Form

12.5.1 Primary Actors

The following users may edit Case Closure Requests based on the status of the request form. See the Workflow section above for more information about workflow statuses:

User	“In progress” status	“Pending Lead Review” status	“Pending MDH review” status	Clarification requested
MDH REM Administrator	X	X	X	
MDH REM Intake Nurse	X			
CMA REM Case Manager	X			X
CMA REM Supervisor		X		X
CMA REM Administrator		X		X

Table 24-Add REM Case Closure Edit Primary Actors

1. From the Client Details tab, select the **Programs** banner on the left navigation.
2. Select **REM Request for Case Closure**.
3. The system navigates the screen to **REM Request for Case Closure - List** page.



Figure 191-Add REM Case Closure Request

12.6 List/View a REM Request for Case Closure Form

The following users may view the REM Request for Case Closure in read only mode:

12.6.1 Primary Actors

Department	Roles
MDH	MDH REM Intake Nurse, MDH REM Administrator, MDH REM Intake Specialist, MDH REM Physician Advisor
Assigned CMA	CMA REM Administrator, CMA REM Supervisor, CMA REM Case Manager, CMA REM Intake Specialist, CMA REM Provider relations rep

Table 25-REM List/View REM Request for Case Closure Primary Actors

1. From the Client Details tab, select the **Programs** banner on the left navigation.
2. Select **REM Request for Case Closure**.
3. The system navigates the screen to **REM Request for Case Closure - List** page.

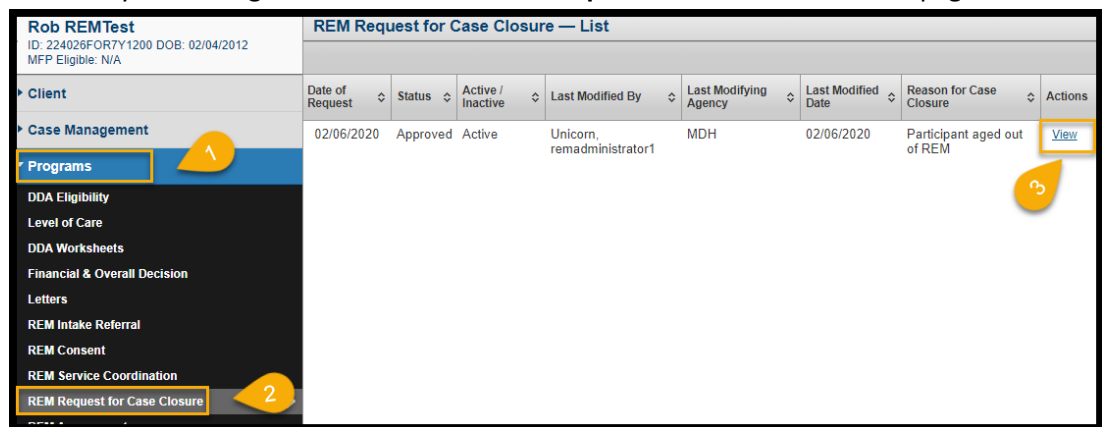


Figure 192-REM View Case Closure Request

4. The system will generate the selected REM Case Closure Request in read-only view. To view the form details or workflow history, select on the right arrows on the appropriate line to expand. Select the **Back to List** hyperlink to return to the REM case closure list.

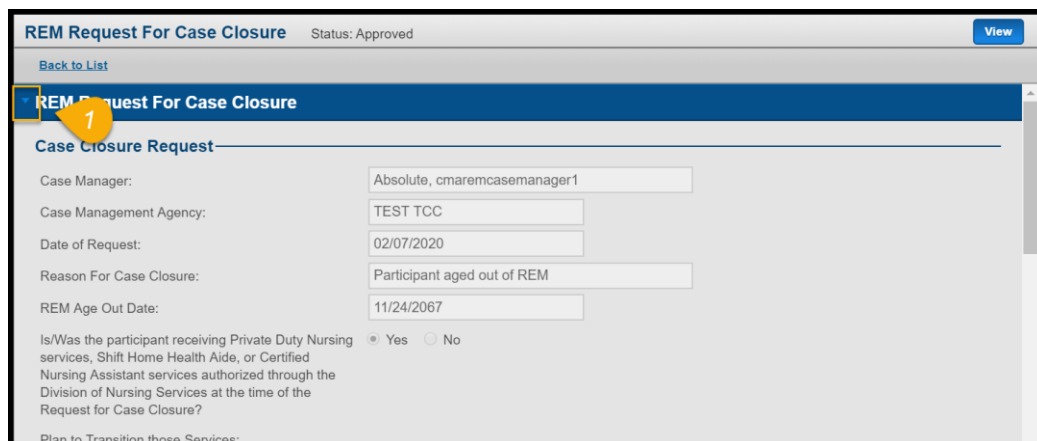


Figure 193-REM View Case Closure Request form view


12.7 Discard a REM Request for Case Closure Form

12.7.1 Primary Actors

Discarding a Case Closure Request ends the request closure process without making a final determination. A Case Closure Request can only be performed on an existing “In progress” or “Pending Lead Review” status.

User	“In progress” status	“Pending Lead Review” status
MDH REM Administrator		X
CMA REM Case Manager	X	X
CMA REM Supervisor		X
CMA REM Administrator	X	X

Table 26-Add REM Case Closure Edit Primary Actors

1. From the Client Details tab, select the **Programs** banner on the left navigation.
2. Select **REM Request for Case Closure**.
3. The system navigates the screen to **REM Request for Case Closure - List** page.
4. Select the **Discard** button on the upper-right hand of the panel. To review the form contents or the workflow history, select on the right arrows  on the appropriate line.

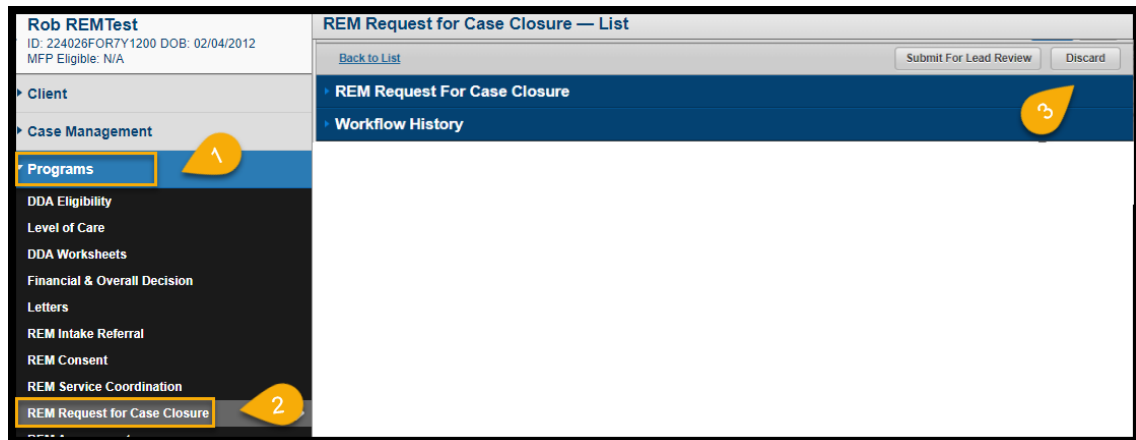


Figure 194-Add REM Case Closure Discard

- The system will display a confirmation popup. Add comments to explain the reason for discarding the request, and then select the Yes **button**.

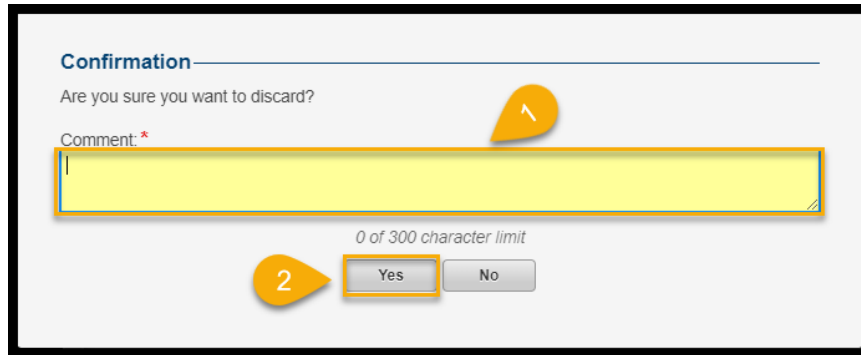


Figure 195-Add REM Case Closure Discard Confirmation

- The system will display a success message, confirming that the Case Closure Request has been discarded. The status of the request will be changed to “Discarded.” Select **Back to List** hyperlink to return to the REM Case Closure Request Form – List.

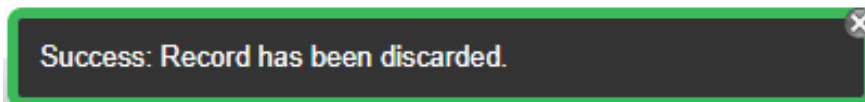


Figure 196-Add REM Case Closure Discard Success Message

12.8 Deactivate a Case Closure Request

Deactivating a Case Closure Request changes its status from “Active” to “Inactive.” It can only be performed on “Approved” Case Closure Request forms. The request remains in “Approved” status.

12.8.1 Primary Actors

Department	Roles
MDH	MDH REM Administrator


Table 27-Deactivate REM Case Closure Request - Primary Actors

- From the Client Details tab, select the **Programs** banner on the left navigation.
- Select **REM Request for Case Closure**.

- The system navigates the screen to **REM Request for Case Closure - List** page.



Figure 197-REM Deactivate Case Closure Request View

- The system navigates the Request for Case Closure form. Select **Deactivate**. To review the form contents or the workflow history, select on the right arrows  on the appropriate line.

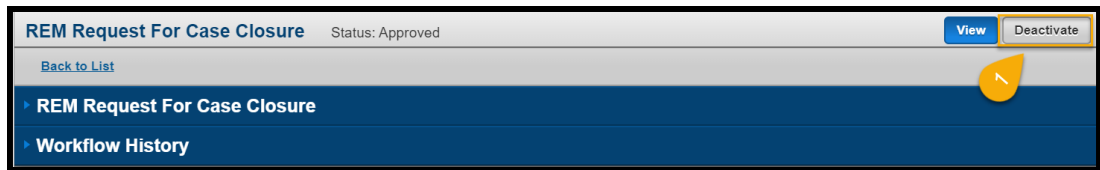


Figure 198-REM Deactivate Case Closure Request View

- The system will generate a confirmation popup. Select **Yes** to confirm deactivation.



Figure 199-REM Deactivate Case Closure Request Confirmation

13 REM Assessment

The REM Assessment is a multi-part comprehensive assessment tool that is used in capturing and determining a Client’s medical conditions, surroundings, appointments, services and any other needs. The REM Assessment is required annually for a Client enrolled in REM.

The REM Assessment is a multi-part comprehensive assessment tool that is used in capturing a Client’s medical conditions, surroundings, appointments, services and determining any other needs. The REM Assessment is required annually for a Client enrolled in REM and a Significant Change Assessment can be completed when necessary.

This manual includes the business requirements for creating and completing the REM Assessments and the alerts associated with them.

13.1 Assessment Types

There are three (3) types of assessments: Initial, Annual and Significant Change.

REM ASSESSMENT	DESCRIPTION
Initial	Auto-generated “In Progress” REM Assessment once the Case Management Agency is assigned to a Client.
Annual	Auto-generated “In Progress” REM Assessment every 11 months starting from last Assessment submission.
Significant change	Manually added anytime once Initial Assessment has been submitted.

13.2 Primary Actors

The following user roles can **Add or Edit** a REM Assessment:

Department	Roles
MDH	MDH REM Administrator
Assigned CMA	CMA REM Case Manager, CMA REM Supervisor

Table 28-Add/Edit REM Assessment - Primary Actors

The following user roles can **List or View** REM Assessment:

Department	Roles
MDH	REM Intake Nurse, REM Administrator, REM Intake Specialist, REM Physician Advisor
Assigned CMA	CMA REM Administrator, CMA REM Supervisor, CMA REM Case Manager, CMA REM Intake Specialist, CMA REM Provider Relations Rep

Table 29-List/View REM Assessment - Primary Actors

13.3 REM Assessment Workflow

Once the REM Assessment is added manually or auto-generated, it will be in an “In Progress” Status. Upon submission the assessment will transition to “Submitted” status. If discarded, the assessment will transition to “Discarded” status.

NOTE: Once the REM Assessment is created it will also get an Assessment submission Due Date of 30 days from the date of creation.

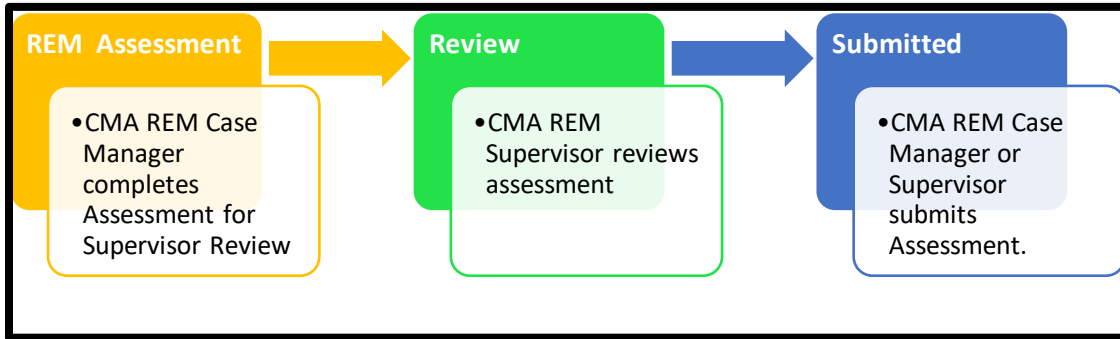


Figure 200- REM Assessment Workflow

13.3.1 REM Assessment Auto-Generation and Alerts

The rules for REM assessment auto-generation are as follows:

1. An Initial REM Assessment will be auto-generated once Client is assigned to a CMA.
2. An Annual REM Assessment will be auto-generated 335 days from the latest submitted assessment

NOTE: The assigned CMA REM Case Manager or CMA REM Intake Specialist will receive systems alerts to work on the assessment based on the conditions below.

Initial Assessment and Annual Assessment will send 2 alerts each as follows:

First alert

1st Alert will be sent after 5 days of “Assessment creation / CMA Assignment” to Client’s assigned CMA REM Case Manager. If there is no Case Manager assigned, then CMA Intake Specialist will receive an alert.

- Alert Message will be displayed with the due date of the assessment and it will be a hyperlink.
- Hyperlink will navigate the screen to REM Assessment List Page.

Second alert

2nd Alert: 7 days before the due date of the respective REM Assessment to Client’s assigned CMA REM Case Manager and if there is no Case Manager assigned then CMA Intake Specialist will receive an alert.

- Alert Message will be displayed with the due date of the assessment and it will be a hyperlink.
- Hyperlink will navigate the screen to REM Assessment List Page.

13.4 View REM Assessment List Page

Users can view the list of REM Assessments available for a Client through following steps:

To view REM Assessment list for a Client:

1. Select **Clients** tab, Enter Client search criteria and Click **Cases**.
2. From the search results list, select **Client Summary** hyperlink
3. From the Client Profile, select the **Programs** banner on the left navigation.
4. Select **REM Assessment**.
5. System displays the list of REM Assessments.

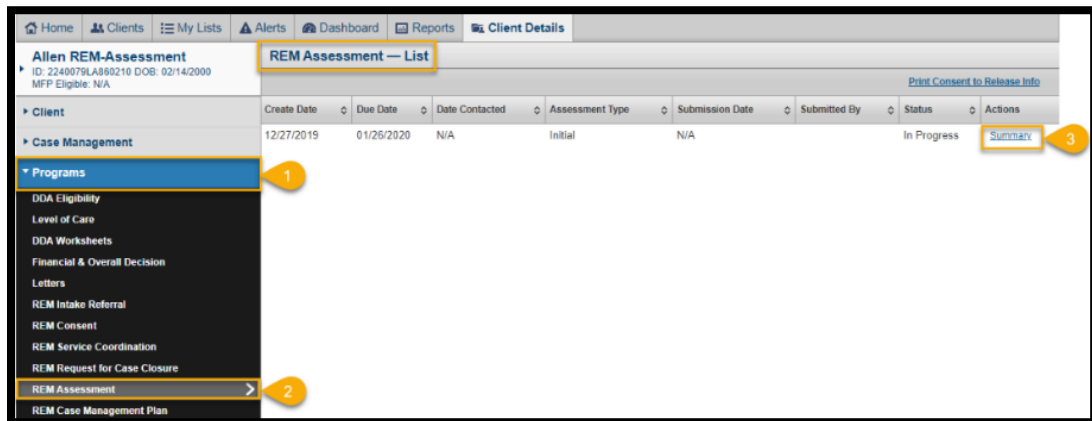


Figure 2-REM Assessment List View

13.5 Print Consent to Release Information

A blank Consent to Release Information form with Client information pre-populated can be printed from the REM Assessment List Page.

Case Manager uses this form to obtain consent from their assigned Client to release information to certain parties, such as representatives.

NOTE: Once completed and Client’s consent obtained on this form it **should** be uploaded in Client Attachments section of the Client under REM Documents Category.

Use the following steps to print or download the Consent to Release Information form:

1. From the Client Profile, select the **Programs** banner on the left navigation
2. Select **REM Assessment**
3. Select **Print Consent to Release Information** hyperlink.

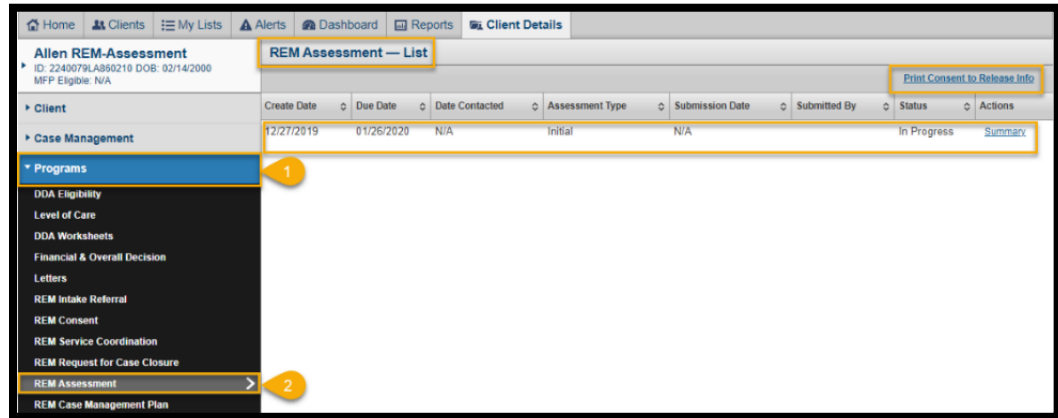


Figure 3-REM Assessment Print Consent to Release Information

4. A new window tab will open with the Consent to Release information form in .pdf format with options to print and download. Zoom controls to expand / reduce the size of the form is also available (these zoom controls are in built capabilities in most web browsers).

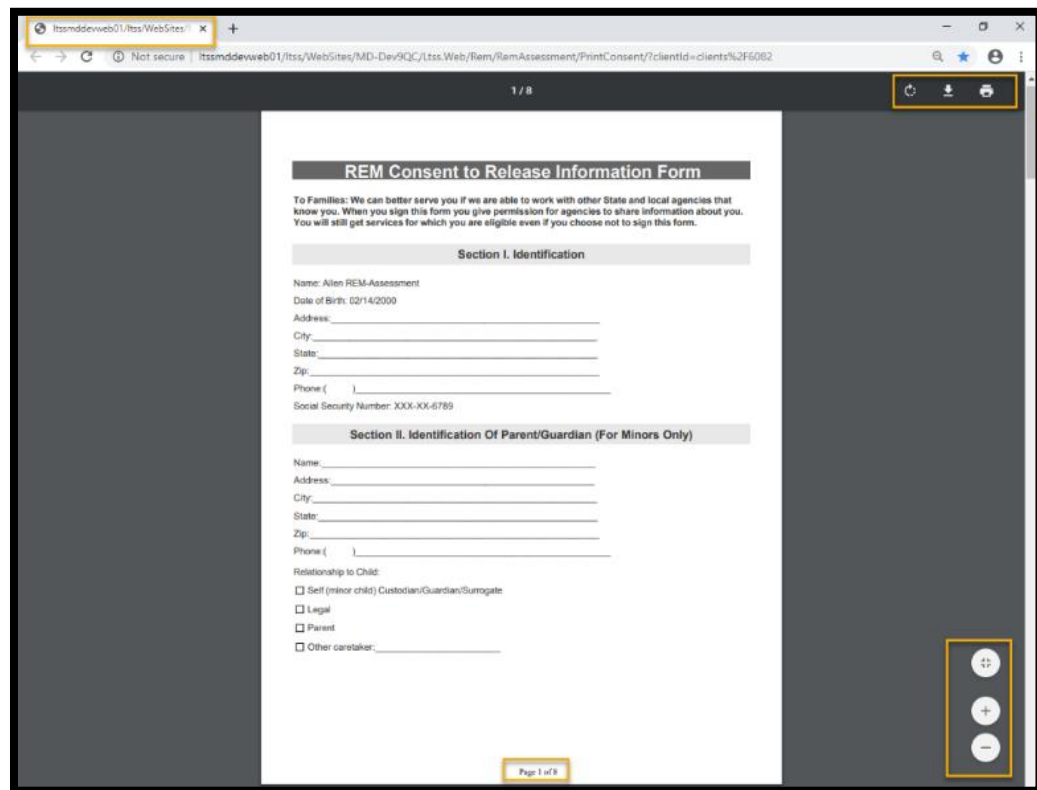


Figure 4-Print Consent to Release Information Example

13.6 View REM Assessment

As discussed above, system will auto-generate Initial and/or Annual REM Assessment and Significant Change Assessment can be added Manually.

An “In Progress” REM Assessment is created upon Auto-generation or Manual addition. Use the following steps to View an “In Progress” REM Assessment Summary Page:

1. From the Client Profile, select the **Programs** banner on the left navigation.
2. Select **REM Assessment**.
3. Select **Summary** hyperlink under the Actions column.

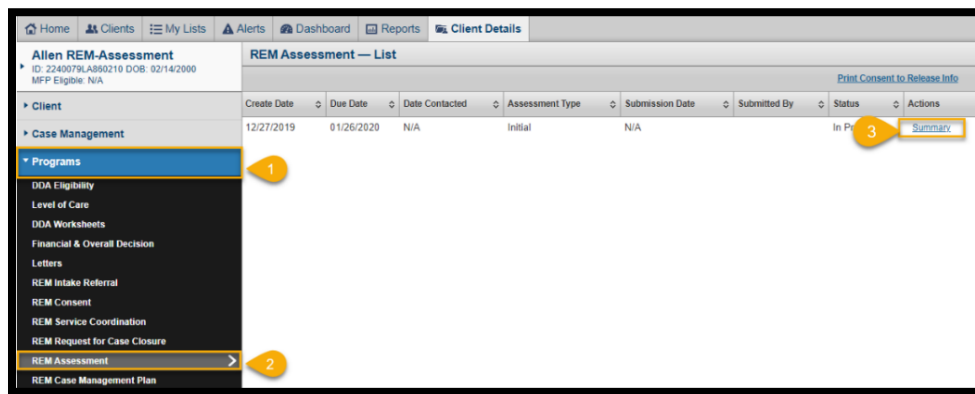


Figure 4201- REM Assessment Summary

The REM Assessment – Summary page is displayed in View mode.

The Overview Panel displays Client’s demographic information. Some fields in Overview panel are pre-populated and some fields are required to submit the REM Assessment.

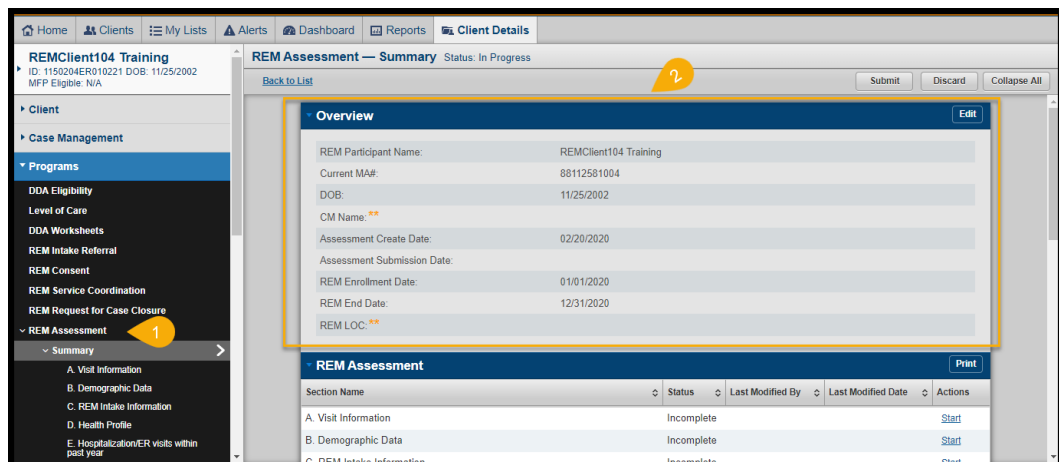


Figure 5 REM Assessment Overview Panel

- **REM Assessment** Panel displays the List of all the 27 Sections (Section A – Section AA) in a list page. REM Assessment Section List page displays the following fields against each section:

- Section Name – Name of the section
- Status – Status of the Section; Incomplete, In Progress, Complete
 - **Incomplete:** Section hasn't been started yet
 - **In Progress:** Section started but not complete
 - **Complete:** All the required fields in the section Complete
- Last Modified By – Person who last saved the section
- Last Modified Date - Date when the section was last saved
- Actions - Start, Edit, Check Errors, View
 - **Start:** Start editing a section that is in Incomplete status.
 - **Edit:** Start editing a section that is in In Progress or Complete Status
 - **Check Errors:** Highlights the missing fields in an In Progress section.
 - **View:** To view the section in read-only mode.

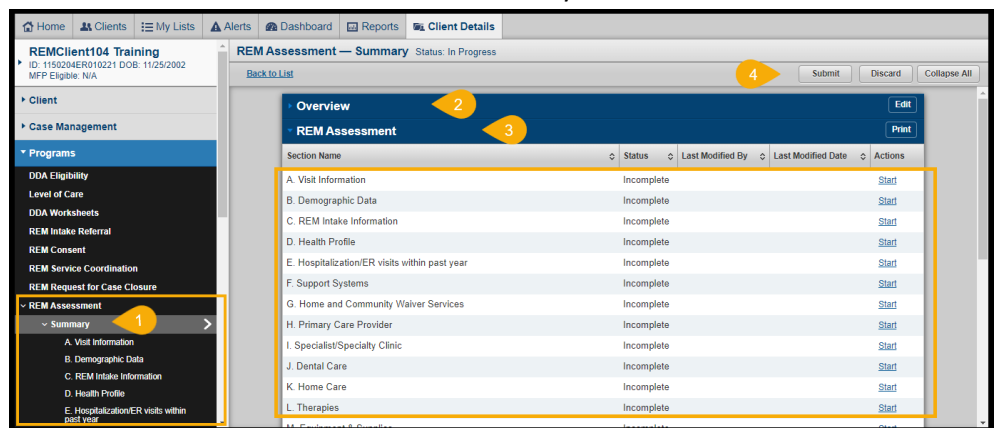


Figure 6-View REM Assessment Summary Page

4. Users can also navigate through various sections from Left Navigation bar under REM Assessment banner.

13.7 Edit REM Assessment

The CMA REM Case Manager will typically complete the REM Assessment, which includes an **Overview** and **REM Assessment** sections that are required to be completed before submitting the assessment.

13.7.1 Edit REM Assessment Overview

The **REM Assessment Overview** is pre-populated with the Full Name of the Client from the Client profile in Client Demographics Section and requires having the CMA REM Case Manager name and Level of Care selected.

Use the following steps to Edit the REM Assessment Overview:

1. Select **Edit** on the **Overview** panel to open the Overview section in Edit mode
2. Overview Panel in edit mode will display some fields pre-populated and some fields as required to submit the REM Assessment.

REM Assessment [Edit](#)

[Back to Summary](#) [Cancel](#) [Save](#)

Overview

REM Participant Name: Allen REM-Assessment

Current MA#: 653242893

DOB: 02/14/2000

CM Name: ** Required Field

Assessment Create Date: 12/27/2019

Assessment Submission Date:

REM Enrollment Date:

REM End Date:

REM LOC: **

Figure 7 - REM Assessment Overview Edit Mode

3. The Edit mode displays options to **Save**, **Cancel** the changes, or to go to the summary view using **“Back to Summary”** link.
NOTE: Fields denoted with **** asterisks** indicates a field is required to submit Assessment.
4. Upon Save, system displays the **Overview** section with the updated fields on the Summary Page.

REM Assessment — Summary Status: In Progress

[Back to List](#) [Submit](#) [Discard](#) [Collapse All](#)

Overview [Edit](#)

REM Participant Name: Allen REM-Assessment

Current MA#: 653242893

DOB: 02/14/2000

CM Name: ****** CMA REM Case Manager2

Assessment Create Date: 12/27/2019

Assessment Submission Date:

REM Enrollment Date:

REM End Date:

REM LOC: ****** Assessment

REM Assessment [Print](#)

Section Name	Status	Last Modified By	Last Modified Date	Actions
A. Visit Information	Incomplete			Start
B. Demographic Data	Incomplete			Start
C. REM Intake Information	Incomplete			Start

Figure 8 -REM Assessment Overview – with required fields updated

13.7.2 REM Assessment Sections

The REM Assessment contains **27 sections** that are required to be completed before submitting the REM Assessment.

- A. Visit Information
- B. Demographic Data
- C. REM Intake Information

- D. Health Profile
- E. Hospitalization/ ER visits within past year
- F. Support Systems
- G. Home and Community Waiver Services
- H. Primary Care Provider
- I. Specialist/Specialty Clinic
- J. Dental Care
- K. Home Care
- L. Therapies
- M. Equipment & Supplies
- N. Medications
- O. Nutritional
- P. Allergies
- Q. Lab and Diagnostic Outpatient Technology
- R. Environment of current living arrangement
- S. Education
- T. Occupation, Vocation, Day Program
- U. Transportation
- V. Social, Cultural, Language and Community Issues
- W. Non- Medicaid Reimbursed Services
- X. REM Qualifying Diagnosis
- Y. Case Management Interaction with Multidisciplinary Team/ Outcomes
- Z. Issues and opportunities identified from Assessment/ IPOC
- AA. Supervisor Review

NOTE: All the sections have various required fields that the user will be required to fill out before submitting the assessment.

Tip: User can navigate between sections from the left navigation under Programs and REM Assessment. Make sure to Save the section before navigating to any other section.

13.7.3 Common Functions available on REM Assessment List Panel

Start

- Start hyperlink is available on the Actions column of REM Assessment List Panel.
- This hyperlink is only available for the section in “Incomplete” status.
- Directs the user to the Edit page of that respective section.

A. Visit Information	Incomplete	Start
B. Demographic Data	Incomplete	Start
C. REM Intake Information	Incomplete	Start

Figure 202-REM Assessment Overview – with required fields updated

Edit

- Edit hyperlink is available on the Actions column of REM Assessment List Panel.
- This hyperlink is only available for the section in “In Progress” status.

- Directs the user to the Edit page of that respective section.

Section Name	Status	Last Modified By	Last Modified Date	Actions
A. Visit Information	In Progress	REM, CMA Case Manager	02/20/20	Edit View Check Errors
B. Demographic Data	Incomplete			Start
C. REM Intake Information	Incomplete			Start

Figure 203-REM Assessment Edit

NOTE: Fields denoted with **** asterisks** indicates a field is required to submit Assessment.

Check Errors

- Check Errors hyperlink is available on the Actions column of REM Assessment List Panel.
- This action is only available for the sections in “In Progress” status.

Section Name	Status	Last Modified By	Last Modified Date	Actions
A. Visit Information	In Progress	REM, CMA Case Manager	02/20/20	Edit View Check Errors
B. Demographic Data	Incomplete			Start
C. REM Intake Information	Incomplete			Start

Figure 204-REM Check Errors

- Directs the user to the Edit page of that respective section and highlights (in pink) any missing required fields.

A. Visit Information

1. Date Contacted**

2. How was the client contacted? **

- 1. In Person Visit
- 2. Phone Call
- 3. E-mail
- 4. Other

3. Was the Emergency Information form discussed with the client?

- 1. Yes
- 2. No

4. Was the Consent to Release Information received? **

- 1. Yes
- 2. No
- 3. N/A

Figure 205-REM Visit Information

Back to List

- This hyperlink navigates the page back to the REM Assessment List Page

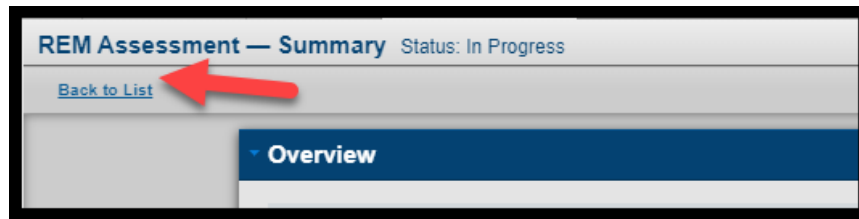


Figure 206-REM Visit Information

- **Status:** status of the REM Assessment is displayed on the REM Assessment Summary Page.
NOTE: Submit and Discard are discussed later in the document.

13.7.4 Common Actions Available on a Section’s Edit Page

Save & Next

- This action will not be available in Section AA.
- Saves the section and navigates to the next section.

Save

- This action will be available for all the sections.
- Saves the section and stays on the screen

Save & Previous

- This action will not be available in Section A.
- Saves the section and navigates to the previous section.

Cancel to ignore the changes

Back to Summary to navigate to the REM Assessment Summary page.

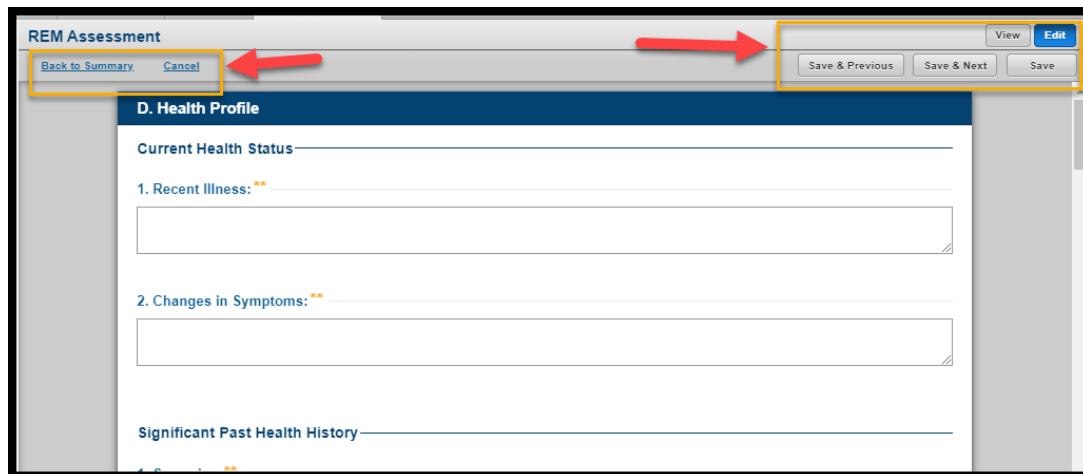


Figure 207-Variou Actions on Edit Page

13.7.5 Common Functions Available on Various Section’s Edit Page

+ Add buttons displayed in green



Figure 208-Common Functions +Add Option

Adds rows in the table of various sections

Figure 209-Variou Actions on Edit Page

Save: This save action populates the information in the table. And the data is displayed in the table.

NOTE: User must select table Save to populate the information in the table and then use main save from the top right corner to save the populated information

- **Cancel:** Cancels the add row action and stays on the edit page of that section.
- **Edit & Delete:** This hyperlink will be available in the table. Edit will open the row for editing and delete will delete the respective row.

Facility	Admission or Visit Date	LOS (No. of Days)	Reason for admission or visit	Actions
Testing facility	02/12/2020			Edit Delete

Figure 210-Hospitalization or ER Visits

- **Search:** Provider search action will be available in various sections of the REM Assessment as applicable.

The screenshot shows the 'Specialist/Specialty Clinic' form. At the top, there are navigation buttons: 'Back to Summary', 'Cancel', 'Save & Previous', 'Save & Next', and 'Save'. The form title is 'I. Specialist/Specialty Clinic'. Below the title is the section 'Specialist/Specialty Clinic Provider'. The form contains several input fields: 'Name:**', 'Provider Number:**', 'Address:' (with 'MD' entered), 'Phone Number:', 'Specialty:**', 'Frequency of Visits:**' (with a dropdown menu set to 'Please select'), 'Last Appt.:' (with radio buttons for 'Exact Date' and 'Approximate Date'), and 'Next Appt. Date:' (with radio buttons for 'Due' and 'Scheduled'). At the bottom of the form are 'Save' and 'Cancel' buttons. A yellow box highlights the 'Search' button next to the 'Name' field, with a mouse cursor pointing to it.

Figure 211-Section I. Specialist/Specialty Clinic (Search Provider)

1. Upon clicking on the **Search** button, the system displays the Provider Search Pop-up Window for the user to select a provider from.
2. User can search by Provider Name, Provider Number, Provider Type and County.
3. The user can filter the generated list further from the bottom right "Filter All Columns" field based on name, phone number, type, or county.

The screenshot shows the 'Provider Search' pop-up window. It has search criteria for 'Provider Name:', 'Provider Number:', 'Provider Type:' (with a dropdown menu set to 'All'), and 'County:' (with a dropdown menu set to 'Baltimore City'). There is a 'Search' button. Below the search criteria is a table of search results. The table has four columns: 'Provider Name', 'Provider MA Number', 'Provider Address', and 'Actions'. The first row is highlighted, and a yellow box highlights the 'Select' button in the 'Actions' column. The table shows the following data:

Provider Name	Provider MA Number	Provider Address	Actions
REFERRING PHYS DUMMY NUMBER	000005101	201 W PRESTON STREET, BALTIMORE, MD 21201	Select
JONATHAN E SEVRANSKY MD	000100700	JOHNS HOPKINS HOSP BAYVIEW, 301 BAYVIEW BLVD, BALTIMORE, MD 21224	Select
MICHAEL WALLER MD	000101500	9000 FRANKLIN SQUARE DRIVE, BALTO, MD 21237	Select
SINAI HOSPITAL OF BALTIMORE, INC	000135001	2401 W BELVEDERE AVE, REHAB PAIN MEDICINE, BALTIMORE, MD 21215	Select
SANDRA POLIN MD	000156201	600 N WOLFE STREET, BALTIMORE, MD 21287	Select
SUSAN LOVELACE CRNP	000290900	PO BOX 62063, BALTIMORE, MD 21264	Select

At the bottom of the table, it says 'Showing 1 to 200 of 20479 entries' and 'Filter all columns:' followed by an empty input field.

Figure 212-Section I. Specialist/Specialty Clinic (Select search result)

4. Upon selecting a Provider from Provider Search Window, system pre-populates the relevant information in the Section fields.

Figure 213-Section I. Specialist/Specialty Clinic (Complete entry)

5. Upon clicking on Table Save, system populates the information entered to the table.
6. If the user adds another row, system will display a field “List of previously selected providers.”
7. This field will Display all the providers selected previously in this section to help the user select them from the dropdown.

13.7.6 Section AA. Supervisor Review

Use the following steps to continue editing REM Assessment sections:

1. Select **Start** hyperlink under the Actions column to open Section AA in edit mode.

REM Assessment — Summary Status: In Progress				
Back to List Submit Discard Collapse All				
C. REM Intake Information	Complete	Case Manager2, CMA REM	01/02/20	Edit View
D. Health Profile	Complete	Case Manager2, CMA REM	01/02/20	Edit View
E. Hospitalization/ER visits within past year	Complete	Case Manager2, CMA REM	01/03/20	Edit View
F. Support Systems	Complete	Case Manager2, CMA REM	01/03/20	Edit View
G. Home and Community Waiver Services	Complete	Case Manager2, CMA REM	01/05/20	Edit View
H. Primary Care Provider	Complete	Case Manager2, CMA REM	01/05/20	Edit View
I. Specialist/Specialty Clinic	Complete	Case Manager2, CMA REM	01/03/20	Edit View
J. Dental Care	Complete	Case Manager2, CMA REM	01/03/20	Edit View
K. Home Care	Complete	Case Manager2, CMA REM	01/03/20	Edit View
L. Therapies	Complete	Case Manager2, CMA REM	01/03/20	Edit View
M. Equipment & Supplies	Complete	Case Manager2, CMA REM	01/03/20	Edit View
N. Medications	Complete	Case Manager2, CMA REM	01/05/20	Edit View
O. Nutritionals	Complete	Case Manager2, CMA REM	01/04/20	Edit View
P. Allergies	Complete	Case Manager2, CMA REM	01/05/20	Edit View
Q. Lab and Diagnostic Outpatient Technology	Complete	Case Manager2, CMA REM	01/05/20	Edit View
R. Environment of current living arrangement	Complete	Case Manager2, CMA REM	01/05/20	Edit View
S. Education	Complete	Case Manager2, CMA REM	01/05/20	Edit View
T. Occupation, Vocation, Day Program	Complete	Case Manager2, CMA REM	01/05/20	Edit View
U. Transportation	Complete	Case Manager2, CMA REM	01/05/20	Edit View
V. Social, Cultural, Language and Community Issues	Complete	Case Manager2, CMA REM	01/05/20	Edit View
W. Non-Medicaid Reimbursed Services	Complete	Case Manager2, CMA REM	01/05/20	Edit View
X. REM Qualifying Diagnosis	Complete	Case Manager2, CMA REM	01/05/20	Edit View
Y. Case Management Interaction with Multidisciplinary Team/Outcomes	Complete	Case Manager2, CMA REM	01/05/20	Edit View
Z. Issues and Opportunities Identified from Assessment / IPOC	Complete	Case Manager2, CMA REM	01/05/20	Edit View
AA. Supervisor Review	Incomplete			Start

Showing 1 to 27 of 27 entries Filter all columns:

Figure 214-Start Section AA. Supervisor Review

- CMA REM Case Manager will start the section, select a supervisor and save.
- This will trigger an alert to the selected CMA REM Supervisor.
- CMA REM Supervisor will then review the REM Assessment and complete the remaining Section AA.

2. Edit the field entries/selections, including all required fields denoted with asterisks **.

Figure 215-Section AA. Supervisor Review (Select Reviewer)

NOTE: The **Select a Reviewer** list is pre-populated with the names of all the CMA REM Supervisors from the assigned CM Agency.

3. If a CMA REM Case Manager is editing this form, they will not be able to select Date Review Completed field. Only Supervisor can edit this field.

Figure 216-Save Section AA. Supervisor Review

4. Once the CMA REM Case Manager selects a CMA REM Supervisor from the list and saves the section, the selected CMA REM Supervisor will receive an alert.
5. CMA Supervisor upon receipt of the alert, clicks on the alert hyperlink and system navigates the screen to REM Assessment List Page.

NOTE: The CMA REM Supervisor selects the **View** hyperlink to Review each REM Assessment **Sections A thru Z**.

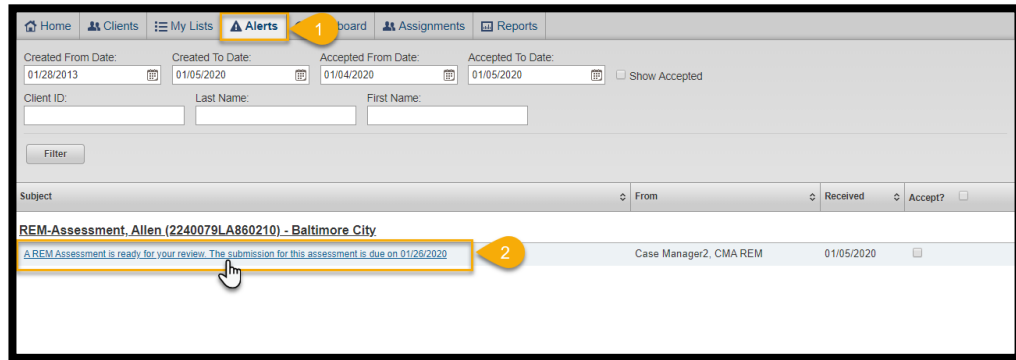


Figure 217- CMA REM Supervisor Review Alert

6. CMA REM Supervisor captures the review completion date in “Date Review Completed” field in Section AA and clicks Save.

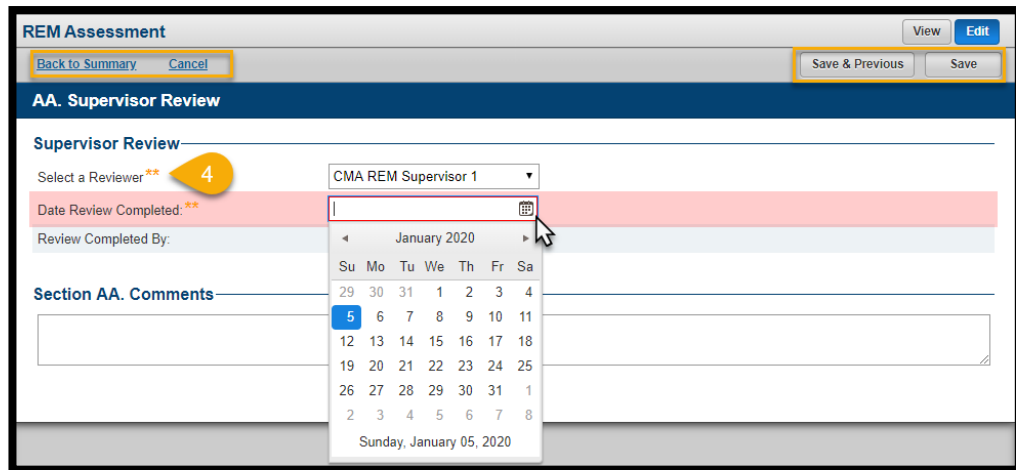


Figure 218- CMA REM Supervisor Review (Select Date Review Completed)

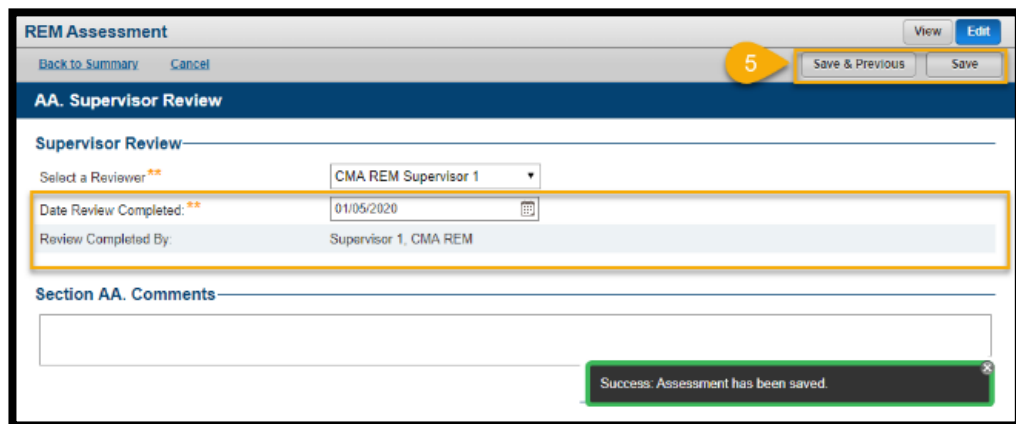


Figure 219-Save REM Assessment

- Status of the Section AA will be changed to complete and the assessment will be ready for submission.

NOTE: CMA REM Case Manager or CMA REM Supervisor can both submit the assessment once completed.

13.8 Submit REM Assessment

Once the REM Assessment Review is completed by the CMA REM Supervisor, the CMA REM Case Manager or CMA REM Supervisor can Submit the REM Assessment.

Use the following steps to Submit the completed REM Assessment:

- From the REM Assessment Summary, Select **Submit**.

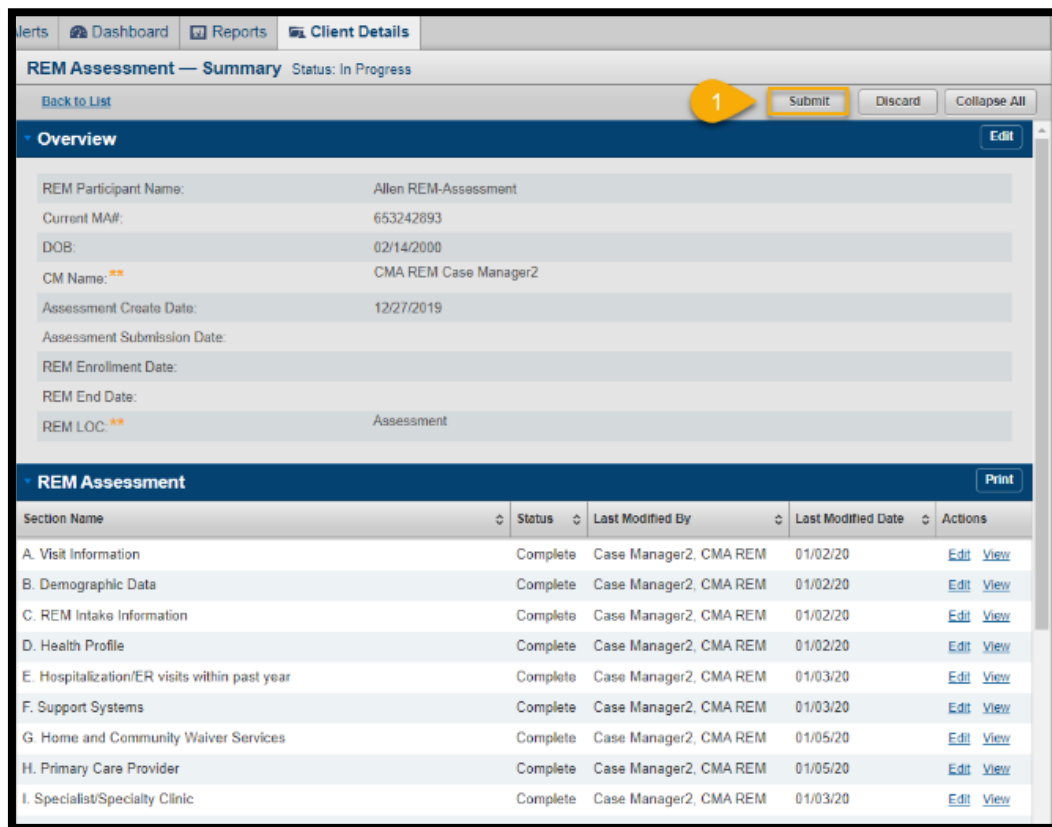


Figure 220-Submit REM Assessment

- The REM Assessment Summary displays Status **Submitted**. Select **Back to List** to display the REM Assessment List view.

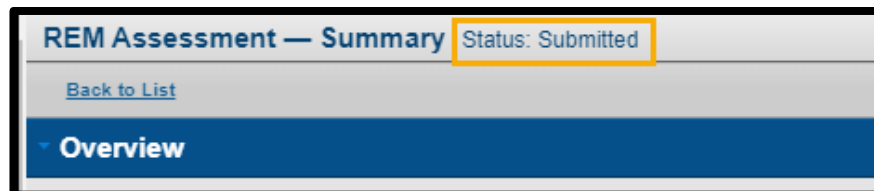


Figure 221 - REM Assessment Summary (Submitted Status)

3. The **REM Assessment List** view also displays the Submitted status.

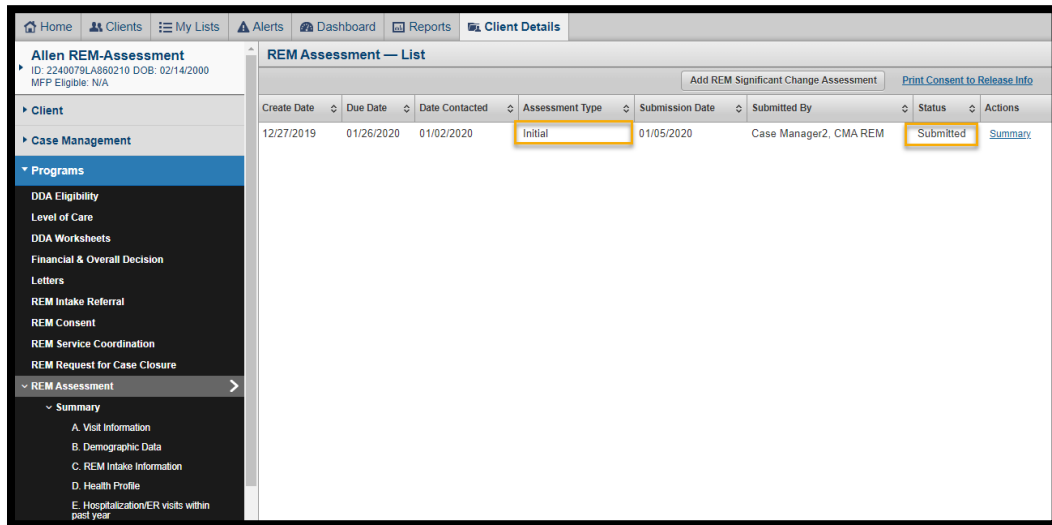


Figure 222-REM Assessment List View (Submitted Status)

13.9 Discard REM Assessment

The Discard option is available if needed, only for an "In Progress" REM Assessment. If an assessment is Discarded, user will have to add the Assessment manually.

Use the following steps to **Discard** a REM Assessment:

1. From the REM Assessment Summary, Select **Discard**.

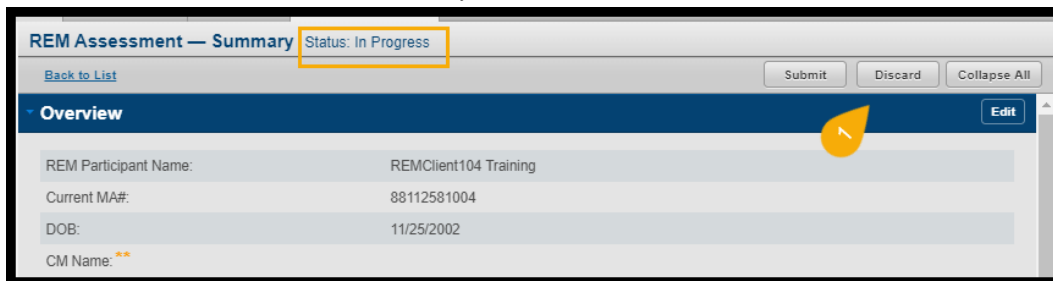


Figure 223--Discard REM Assessment

2. Enter the required comment, Select **Yes** to confirm the REM Assessment **Discard**.

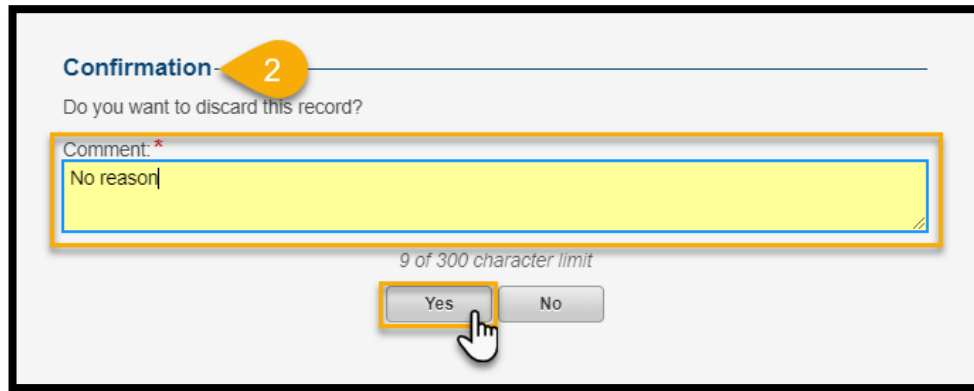


Figure 224-Discard REM Assessment Confirmation

3. The REM Assessment List displays the Discard status.

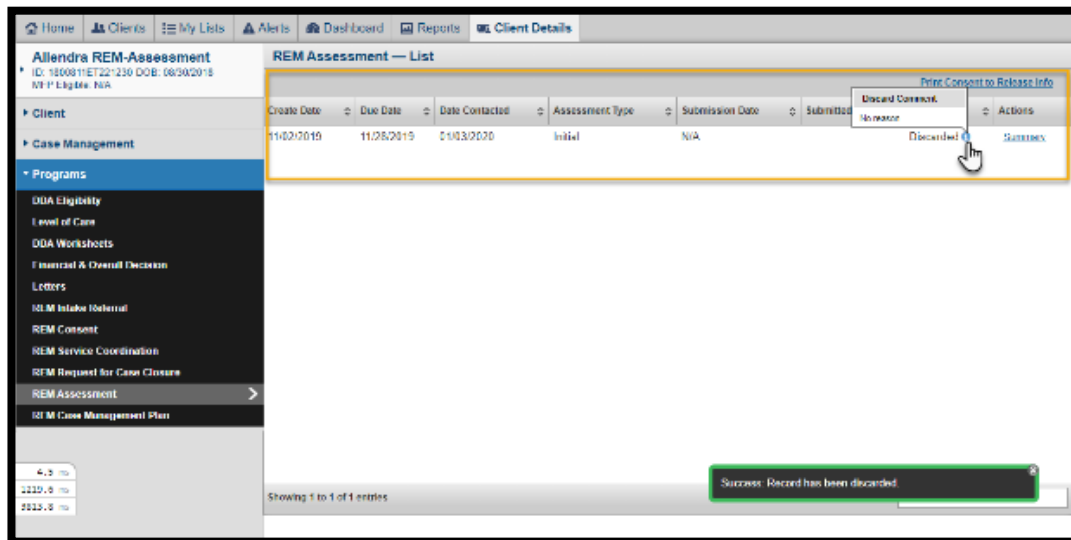


Figure 225-REM Assessment List View - Discard Status

NOTE: If an **Info-Tip** icon displays, click on the icon to view the Info-Tip details/comments.

13.10 Significant Change REM Assessment

The **Significant Change Assessment** can be manually added anytime once an Initial Assessment has been submitted.

Use the following steps to manually **Add REM Significant Change Assessment**:

1. From the Client Profile, select the **Programs** banner on the left navigation.
2. Select **REM Assessment**.
3. Select **Add REM Significant Change Assessment** hyperlink.

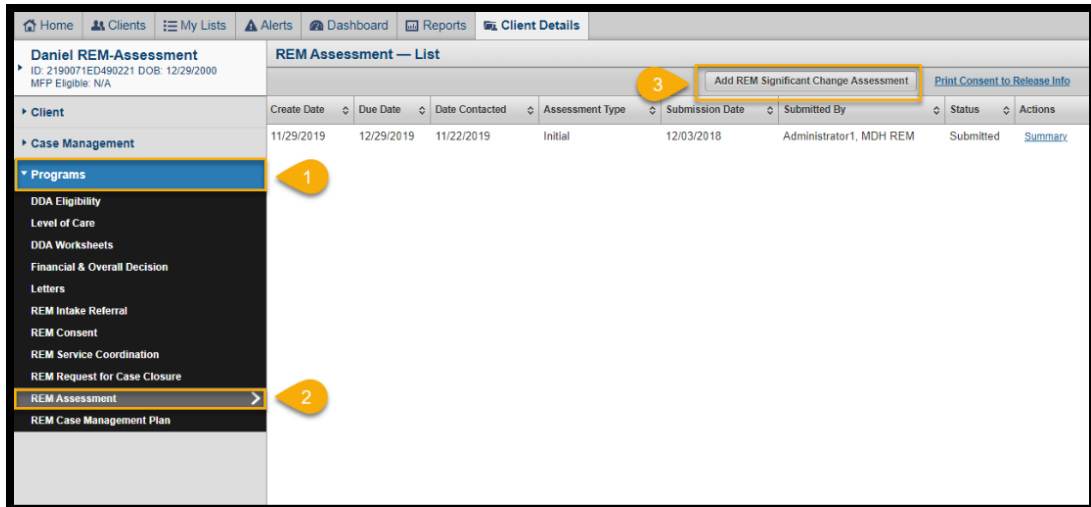


Figure 226-Add REM Assessment Significant Change

4. The REM Assessment Summary page displays the Status in Progress, Success: Record has been created message box, Edit Overview and Start Assessment sections hyperlinks.
5. Select **Back to List** hyperlink to navigate to the REM Assessment List.

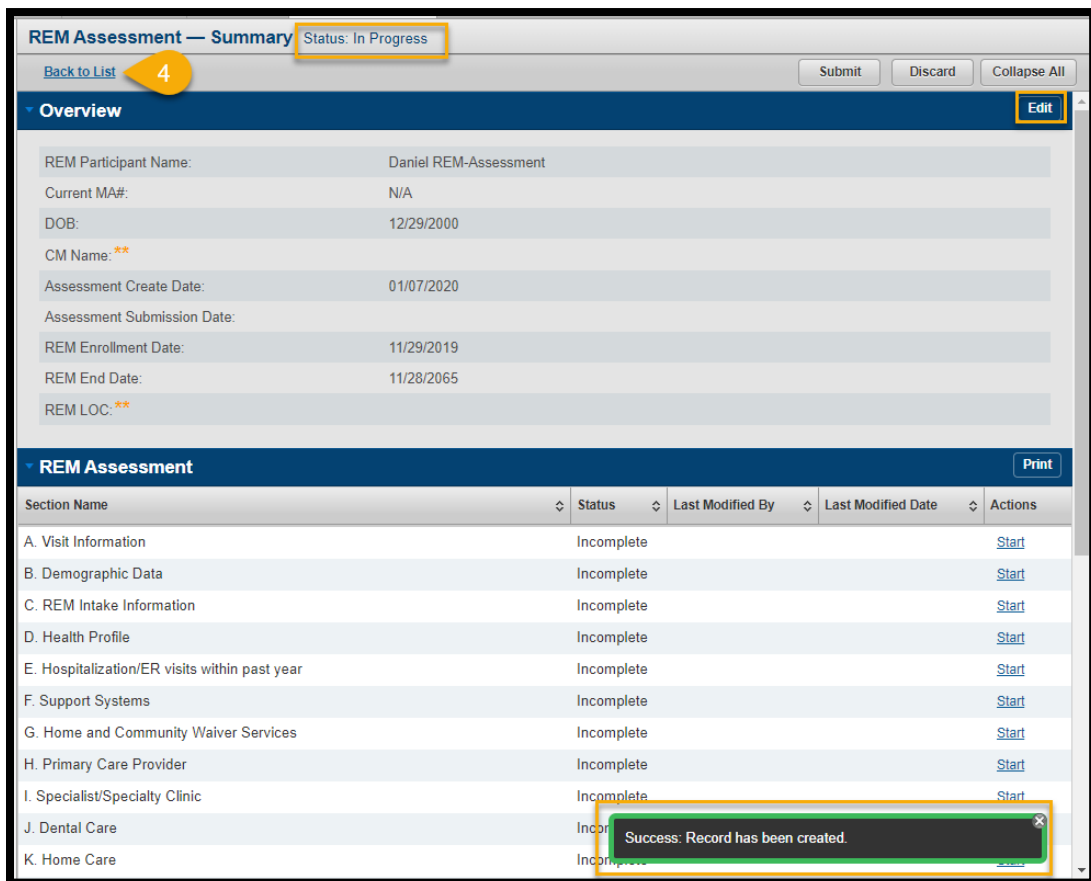


Figure 227-REM Assessment Significant Change Summary Page

THE REM Assessment List displays the **Significant Change Assessment In Progress** status. Select the **Summary** hyperlink to navigate to the Summary page. **Edit** the Significant Change REM Assessment using the **same method** as the **Initial REM Assessment**.

Create Date	Due Date	Date Contacted	Assessment Type	Submission Date	Submitted By	Status	Actions
01/07/2020	02/06/2020	N/A	Significant Change	N/A		In Progress	Summary
11/29/2019	12/29/2019	11/22/2019	Initial	12/03/2018	Administrator1, MDH REM	Submitted	Summary

Figure 228-REM Assessment Significant Change List View

13.11 Annual REM Assessment

The Annual REM Assessment will be auto-generated every 11 months starting from the most recently submitted Assessment

Use the following steps to complete **Annual REM Assessment**:

1. From the Client Profile, select the **Programs** banner on the left navigation.
2. Select **REM Assessment**.
3. System displays **REM Assessment – List** page, with the “Annual” assessment type in the status of “In Progress”
4. Select **Summary** hyperlink under the Actions column for that assessment.

Create Date	Due Date	Date Contacted	Assessment Type	Submission Date	Submitted By	Status	Actions
01/09/2020	02/08/2020	N/A	Annual	N/A		In Progress	Summary
01/10/2019	02/09/2019	01/08/2020	Initial	02/08/2019	Administrator1, MDH REM	Submitted	Summary

Figure 229-Annual REM Assessment List View

The REM Assessment Summary page displays the Status in Progress. Select the **Summary** hyperlink to navigate to the Summary page. **Edit** the Annual REM Assessment using the **same method** as the **Initial REM Assessment**.

REM Assessment — Summary Status: In Progress

[Back to List](#) Submit Discard Collapse All

Overview Edit

REM Participant Name: Andre REM-Assessment
 Current MA#: N/A
 DOB: 11/25/2002
 CM Name: **
 Assessment Create Date: 01/09/2020
 Assessment Submission Date:
 REM Enrollment Date:
 REM End Date:
 REM LOC: **

REM Assessment Print

Section Name	Status	Last Modified By	Last Modified Date	Actions
A. Visit Information	Incomplete			Start
B. Demographic Data	Incomplete			Start
C. REM Intake Information	Incomplete			Start
D. Health Profile	Incomplete			Start
E. Hospitalization/ER visits within past year	Incomplete			Start
F. Support Systems	Incomplete			Start
G. Home and Community Waiver Services	Incomplete			Start

Figure 230-Annual REM Assessment Summary Page

14 REM Level of Care

A Level of Care (LOC) form documents the intensity of case management support the Client requires. The REM program offers four levels of care:

1. **Assessment LOC:** this LOC is considered as the initial LOC applicable in the first month of Client’s REM Enrollment. This LOC is also required if the Client is enrolled in REM and haven’t had a REM LOC for more than 12 months.
2. **LOC 1 (Acutely ill):** An emergent change in the REM participant’s medical condition or service utilization requires intensive case management intervention and follow up
3. **LOC 2—(Unstable):** Instability in the REM participant’s medical condition or service utilization requires ongoing case management intervention
4. **LOC 3—(Stable):** Case management intervention is required on an ongoing basis to monitor the REM participant’s stable service/treatment plans

The Level of Care determines the frequency and intensity of the Case Management Services required.

REM CMA users are responsible for completing a REM LOC every month once the Client is enrolled in REM.

1.5 REM LOC Workflow

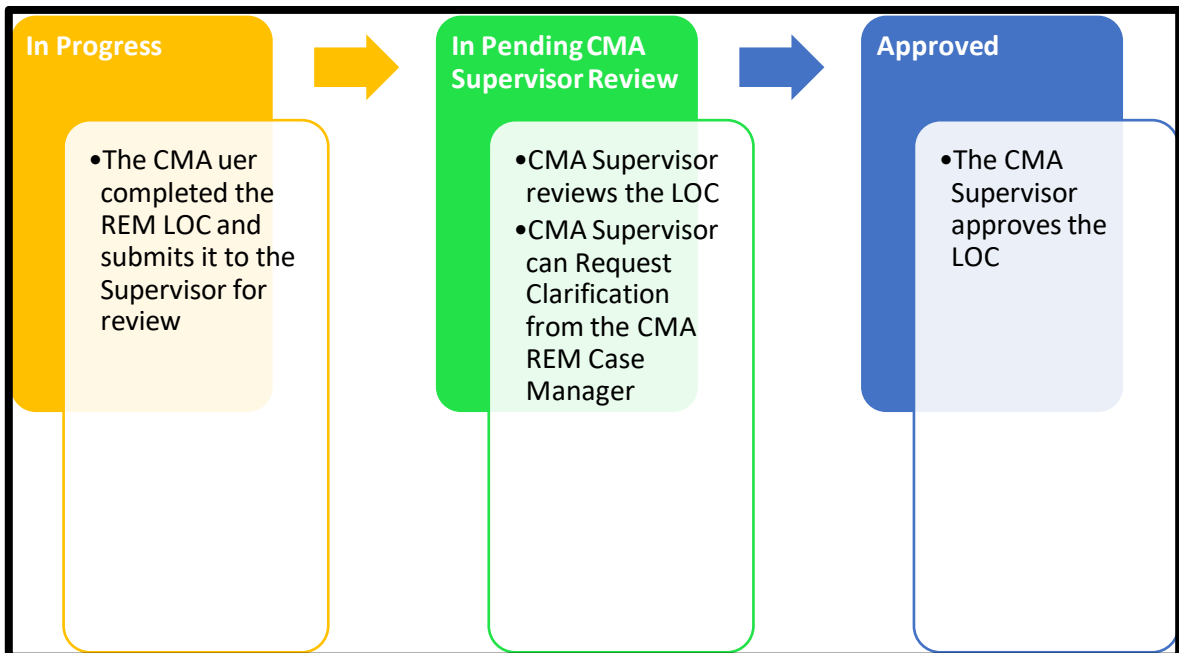


Figure 231-REM LOC Workflow

- **“In Progress”** status
 - CMA user completes the REM LOC and submits for the supervisor to review
- **“Pending CMA supervisor review”** status
 - CMA supervisor reviews the LOC
 - CMA Supervisor can Request Clarification from the CMA REM Case Manager
 - LOCs can be approved by a REM Administrator, CMA REM Administrator, or CMA REM Supervisor
- **“Clarification Requested”** status
 - The person who initiated the LOC will edit the LOC and re-submit for CMA supervisor review
- **“Approved”** status
 - CMA Supervisor approves the LOC

The status history for each LOC form can be reviewed in the **Workflow History** on the bottom of the REM Level of Care—Summary Page.

1.6 Adding a LOC Form

A LOC form cannot be created until an approved and active REM Overall Decision Form has been submitted (i.e. the Client has been enrolled in the REM program). Only one “Active” LOC can be present per month; the user may not add a LOC if an existing LOC form is in “In-Progress,” “Pending CMA Supervisor Review” and “Clarification Request” status.


NOTE: For the Clients approaching their REM Age Out Date, please make sure that the LOC form is approved prior to this date.

1.6.1 Primary Actors

The following user roles can add a REM Level of Care:

Department	Roles
MDH	MDH REM Administrator
Assigned CMA	CMA REM Administrator, CMA REM Supervisor, CMA REM Case Manager, CMA REM Intake Specialist, CMA REM Provider Relations Rep

Table 30-REM Add a REM LOC Primary Actors

1. From the Client Details tab, the CMA Case Manager selects the **Programs** banner on the left navigation.
2. The user selects **Level of Care** from the left-hand side of the panel.
3. The system opens the Level of Care – Summary Page. Select the right arrow  on the **REM Level of Care** heading to expand the view to list all REM LOC forms.

- Click on **Add** button on the right-hand side of the panel.

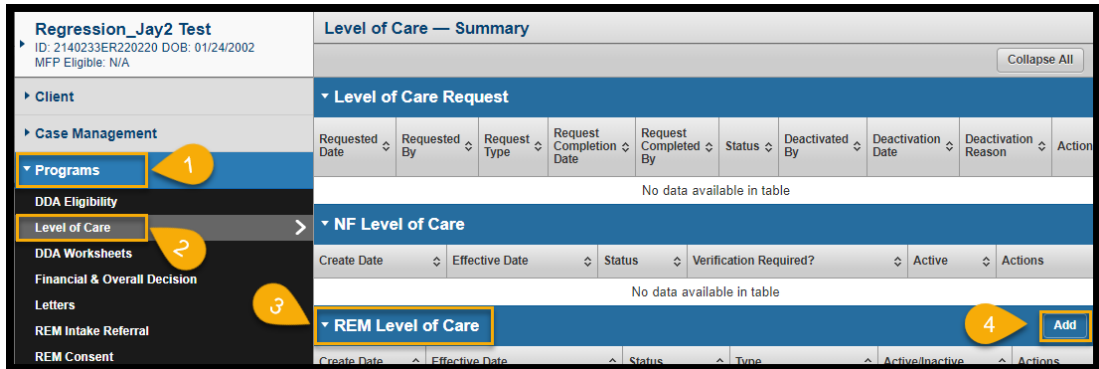


Figure 232-REM Level of Care - Summary

- System displays a **Create LOC** pop up box. Select the appropriate Level of Care from the **LOC Type** dropdown, then select the month of service in the **LOC Month** field. Select the **Save and Close** button.

NOTE: Select “**Assessment LOC**” from the LOC type for the initial REM Assessment.

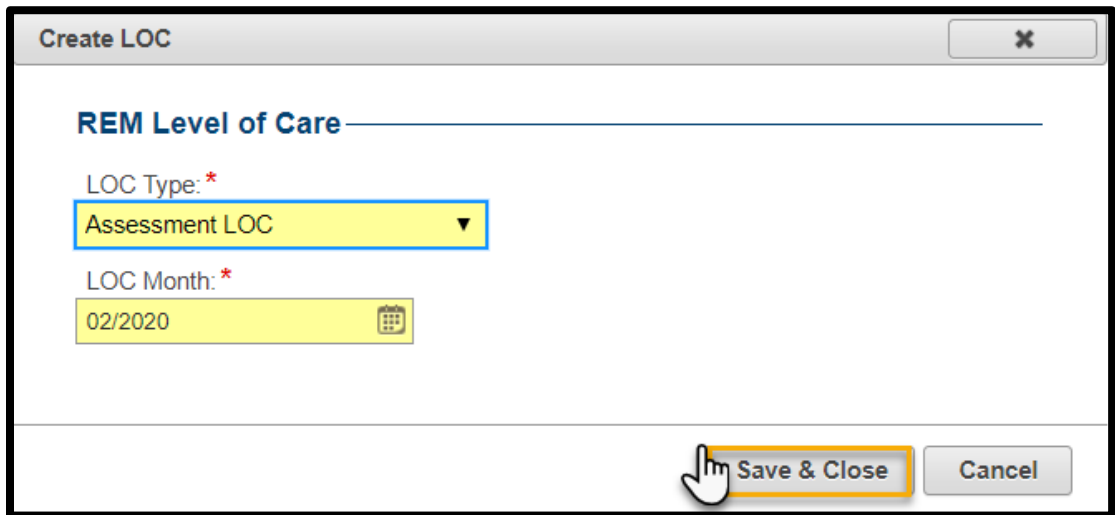


Figure 233-REM Create LOC

- Select **Submit for Supervisor Review** button. This will forward the REM LOC for CMA supervisory review. To close a LOC change without saving it, select the **Discard** button.

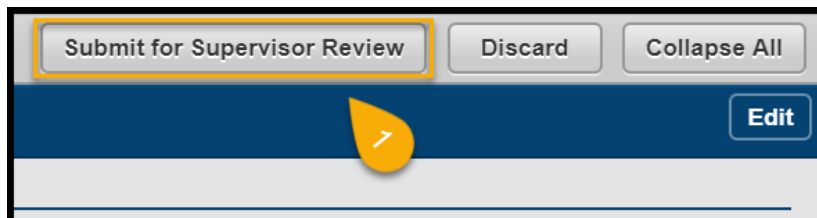


Figure 234-REM LOC Submit for Supervisor Review Button

- The system generates a Submit for Supervisor Review pop up. Select the appropriate reviewer from the **CMA REM Supervisor** dropdown, then select the **Submit** button.

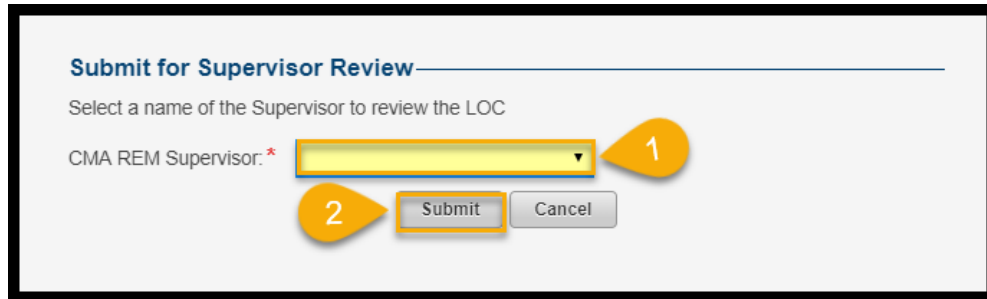


Figure 235-REM LOC Submit for Supervisor Review

- The REM Level of Care form is submitted. The form status changes to “Pending CMA Supervisory Review.”
- The CMA Supervisor then will receive an alert that a LOC has been submitted for their review.
- Upon clicking on the alert hyperlink system will redirect the screen to the respective LOC View Page.
- The CMA supervisor reviews the form and then selects either the **Approve** or **Discard** button. If the CMA supervisor selects Approve, they must confirm by selecting the **Yes** button.

NOTE: If the CMA Supervisor has questions about the submitted LOC form, they can select the **Request for Clarification** button. This will generate a comment pop up. Enter comments and select **Yes** to return the form back to the originator. The status of the LOC form will be changed to “Clarification Requested.”

NOTE: The CMA supervisor may also select the Discard to discard the LOC.



Figure 236-REM LOC Level of Care Summary

The system will generate a success message confirming that the record has been approved.

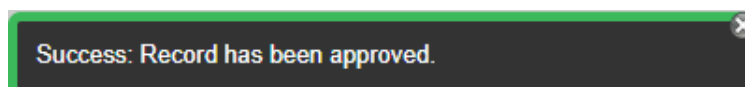


Figure 237-REM LOC Level of Care Summary

12. Select the **X** button to close the success record.
13. Select **Back to List** hyperlink to return to the REM Level of Care—Summary.


1.7 List/View a REM LOC

1.7.1 Primary Actors

Department	Roles
MDH	REM Intake Nurse, REM Administrator, REM Intake Specialist, REM Physician Advisor
Assigned CMA	CMA REM Administrator, CMA REM Supervisor, CMA REM Case Manager, CMA REM Intake Specialist, CMA REM Provider Relations Rep

Table 31- List/View REM LOC – Primary Actors

1.7.2 List/View a REM LOC

1. From the Client Details tab, the user selects **Programs** on the left navigation.
2. The user selects **Level of Care** from the left-hand side of the panel.
3. The system generates the Level of Care – Summary Page. Select the right arrow  on the **REM Level of Care** heading to expand the view to list all REM Level of Care forms.
4. Select the **View** hyperlink in the “Actions” column.

The screenshot displays the 'Level of Care — Summary' page for a client named 'Regression_Jay2 Test'. The left-hand navigation menu is open, showing 'Programs' selected (1) and 'Level of Care' selected (2). The main content area shows a table for 'REM Level of Care' (3) with columns for Create Date, Effective Date, Status, Type, Active/Inactive, and Actions. A 'View' link is highlighted in the Actions column (4).

Requested Date	Requested By	Request Type	Request Completion Date	Request Completed By	Status	Deactivated By	Deactivation Date	Deactivation Reason	Actions
No data available in table									

Create Date	Effective Date	Status	Verification Required?	Active	Actions
No data available in table					

Create Date	Effective Date	Status	Type	Active/Inactive	Actions
02/12/2020	02/01/2020 - 02/29/2020	Approved	LOC 1	Active	View
02/01/2020	02/01/2020 - 02/29/2020	Discarded	LOC 1	Inactive	View
01/31/2020	01/29/2020 - 01/31/2020	Approved	Assessment LOC	Inactive	View

Figure 238-REM Level of Care—Summary List

5. The system generates the REM Level of Care—Summary, where the user can review the LOC details.

- To return to the REM Level of Care—Summary Page, select the **Back to List** hyperlink on the upper-left side of the panel.

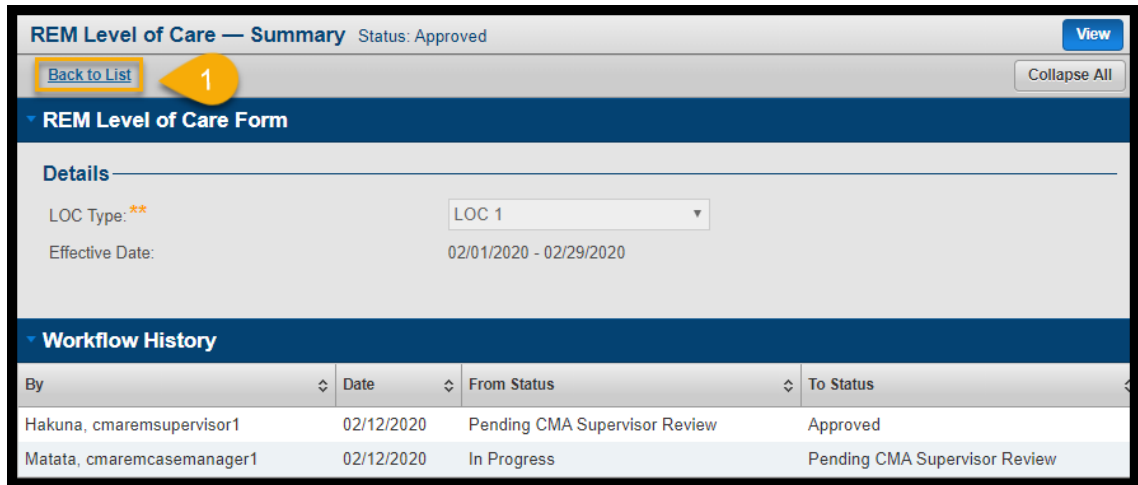


Figure 239-REM Level of Care—Summary

1.8 Edit a LOC

Authorized users can edit LOCs that have the following statuses: “In Progress,” “Clarification Requested,” or “CMA Supervisor Review.”

1.8.1 Primary Actors

Department	Roles
MDH	MDH REM Administrator
Assigned CMA	<p>“In Progress” and “Clarification Request:” CMA REM Administrator, CMA REM Supervisor, CMA REM Case Manager, CMA REM Intake Specialist, CMA REM Provider Relations Rep</p> <p>“Pending CMA Supervisor Review:” REM CMA Supervisors, REM CMA Administrators</p>

Table 32-Edit REM LOC - Primary Actors

15 REM Case Management Plan

The REM Case Management Plan (CMP) documents significant issues and defines goals and interventions needed to achieve the goals. The CMP must be completed for every increase in Level of Care (LOC). A REM CMP cannot be added unless an “Active” and “Approved” intake referral is in place for the Client.

REM CMA users are responsible for completing a REM Case Management Plan.

Plans are not in effect until they are “Active” and “Approved.” If a Client is disenrolled, denied, or declined REM services, the REM CMP becomes inactive. Only one REM CMP can be active at any time. “Significant change” type plans can be discarded if they are in “In Progress” status.

15.1 Types of REM Case Management Plans

REM CMPs can be one of three types: initial, significant change, and revised. These types are described below:

- **Initial:** The first REM CMP must be an “Initial” type plan. The initial REM CMP cannot be added if there is already an “Initial” type REM CMP in any status for the associated approved and active REM ODF. The due date for “Initial” type plans will be set to 30 days from the REM CMA assignment date. Once a Client is disenrolled, the first plan after re-enrollment will be set to “Initial.”
- **Significant change:** Once an “Initial” type REM CMP has been approved then the user may add a Significant Change CMP. (This type of REM CMP cannot be created if the “Initial” REM CMP is any other status besides “Approved.”) Once an Initial REM CMP has been approved, the **Add** button on the top of the REM Case Management List will be changed to an **Add Significant Change** hyperlink. The due date for this type of plan is seven (7) calendar days from the Plan Creation Date. The user may not add a significant change CMP if the revised link is displayed.
- **Revise:** The “Revise” hyperlink is visible in the Actions column of the Case Management Plan List. The Revise hyperlink will be available 30 calendar days before the "Next Revision Date." Once the Revise hyperlink is used, a new "Revised" type plan will be active. The Revised REM CMP can only be submitted if (1) a plan is already “Approved” and “Active” for the respective “Approved” and “Active” Intake Referral and (2) there is no plan with the following statuses: "In Progress", "Pending CMA Supervisor Review," or "Clarification Requested" Status. The due date for the Revised type of plan is 15 calendar days from the plan creation date.

15.2 Plan Revision Dates

A REM CMP revision date is displayed on the REM Case Management Plan heading. This date is calculated according to the Client’s current Level of Care. The LOC level will also be displayed on this heading.

Revision dates are calculated as follows:

- Assessment LOC (highest): N/A.
- Level of Care 1 (high): 90 days from the approval of the latest approved CMP.
- Level of Care 2 (medium): 180 days from the approval of the latest approved CMP.
- Level of Care 3 (low): 180 days from the approval of the latest approved CMP.

15.3 Case Management Plan Workflow

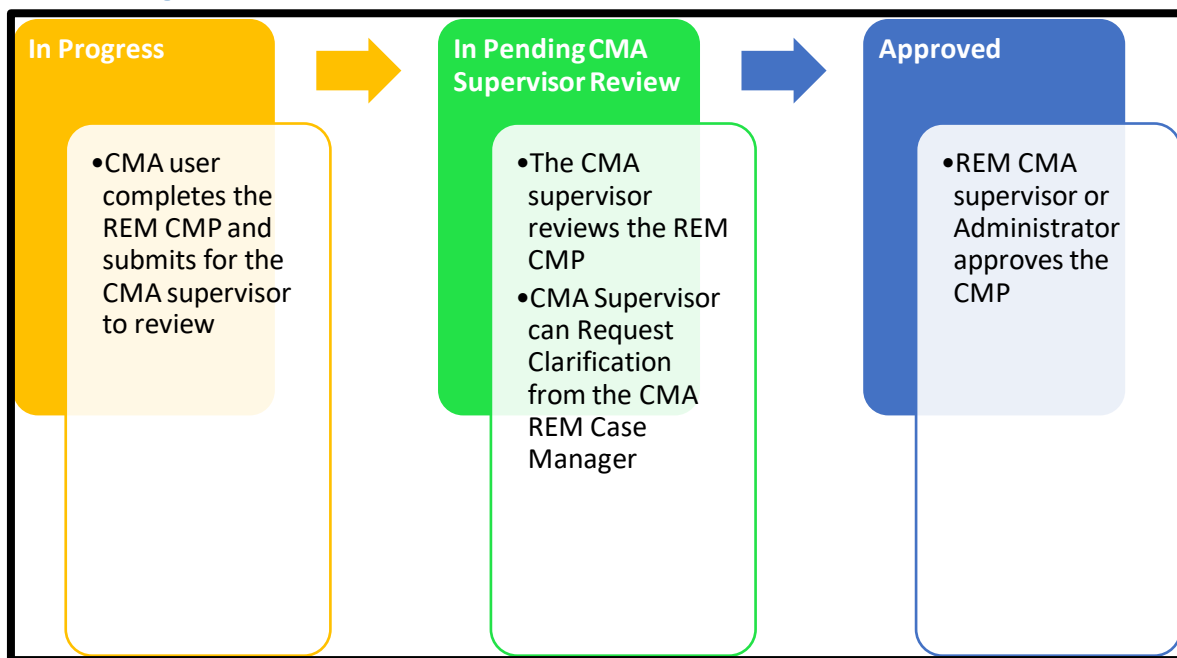


Figure 240-REM Level of Care--Summary

- **“In Progress”** status
 - CMA user completes the REM CMP and submits for the CMA supervisor to review
- **“Pending CMA Supervisor Review”** status
 - The CMA supervisor reviews the REM CMP
 - CMA Supervisor can Request Clarification from the CMA REM Case Manager
 - Case Management Plan can be approved by a CMA REM Administrator, or CMA REM Supervisor
- **“Clarification Requested”** status
 - The user who initiated the REM CMP provides additional information and re-submits it for supervisor review.
- **“Approved”** status
 - REM CMA supervisor or administrator can approve the REM CMP

15.4 Case Management Plan Form Contents

The REM CMP form is divided into four sections:

- Overview: Displays the name of the Client’s assigned case manager, case management agency, creation date, and REM Qualifying Diagnosis
- Current Update: Records changes in medical/psycho-social status, nursing changes, and significant case management activities
- REM Care Plan: Lists REM care plans, which document specific issues, problems, and opportunities that should be monitored—as well as expected outcomes/goals, expected date to complete the goal, barriers to meeting the goal, interventions, and goal evaluation. Multiple REM care plans may be added.
- CMA Supervisor Review: Assigns a supervisor to review the REM CMP, along with comments.

15.5 Add a Case Management Plan

To add a REM CMP, an initial REM assessment must be “Submitted” and a REM LOC in “Approved and Active” status. (See **REM Assessment User Manual** for more information.)

15.5.1 Primary Actors

The following user roles can **Add** a REM Case Management Plan:

Department	Roles
MDH	MDH REM Administrator
Assigned CMA	CMA REM Administrator, CMA REM Supervisor, CMA REM Case Manager, CMA REM Intake Specialist, CMA REM Provider Relations Rep

Table 33- Add REM CMP - Primary Actors

1. From the Client Details tab, select the **Programs** banner on the left navigation panel
2. Select **REM Case Management Plan** on the left navigation panel

- System navigates to **REM Case Management Plan - List** page. Click the **Add** button on the upper-right hand side of the panel.

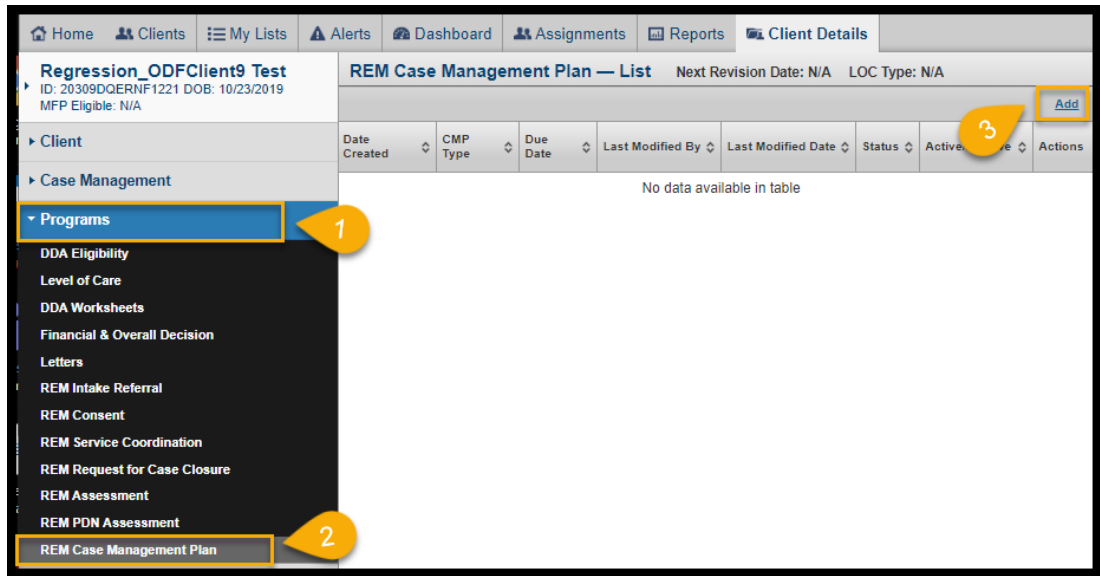


Figure 241-REM Case Management Plan--List

NOTE: A REM assessment must be submitted before a REM CMP Form can be added.

- The system generates a REM CMP form and displays a success message, indicating that all preconditions have been validated. Select the **X** to close the success message.

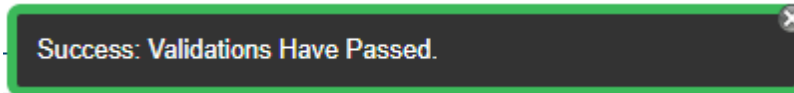


Figure 242-REM Case Management Plan Success Message

- The system generates a REM CMP Form. Add the appropriate information into the REM CMP Form. Once you have completed the form, select the **Save** button on the upper-right side of the panel.

NOTE: Fields denoted with a double asterisk** are required.

REM Case Management Plan Form

Overview

Case Manager:	Creation Date:	02/13/2020
Case Management Agency: TEST TCC	REM Qualifying Diagnosis:	B20

Current Update

Changes in medical/psycho-social status since last report; nursing service changes; significant CM activities with client

Summary of Current Update:**

REM Care Plans

+ Add REM Care Plan

Date Identified	Issues/Problems/ Opportunities	Expected Outcomes/ Goals	Expected Date for Goal	Barriers to Meeting Goals	Interventions	Goal Evaluation	Actions

CMA Supervisor Review

CMA REM Supervisor:**

Please select ▼

CMA Supervisor Notes:

Figure 243-REM Case Management Plan Form

6. The user may create a REM care plan by selecting the **Add REM Care Plan** button.

REM Care Plans

+ Add REM Care Plan

Date Identified	Issues/Problems/ Opportunities	Expected Outcomes/ Goals	Expected Date for Goal	Barriers to Meeting Goals

Figure 244-Add REM Care Plan

The REM Case Management form will expand to include REM care plan fields. Complete the appropriate fields.

- Summary of Current Update: Provide a brief description of the issue, problem, or opportunity identified
- Date identified: Select the date that the issue, problem, or opportunity was identified
- Issues/problems/opportunities: Describe the issue, problem, or opportunity that the care plan is intended to monitor and remediate
- Expected outcomes: Describe the conditions by which success will be measured
- Expected Date for Goal: Assign an end date for the goal
- Barriers to Meeting Goals (optional): Identify any obstacles that might prevent the outcome from being realized
- Interventions: Describe any supports, therapies, or other activities that will be deployed to address the issue, problem, or opportunity

Once all details have been recorded, select the **Save** button. Each REM Care Plan will be now be listed in chronological order.

The screenshot shows the 'REM Care Plan' form with the following fields and callouts:

- 1:** Date Identified: * (calendar icon)
- 2:** Issues/Problems/Opportunities: * (text area)
- 3:** Expected Outcomes/Goals: * (text area)
- 4:** Expected Date for Goal: * (calendar icon)
- Barriers to Meeting Goals: (text area)
- Interventions: * (text area)
- 5:** Goal Evaluation: * (dropdown menu with 'Please select' text)
- 6:** Save button

Figure 245-REM Care Plan Form

NOTE: Fields denoted with a double asterisk** are required.

Select the **View**, **Edit**, or **Delete** buttons beneath the “Actions” column in the REM Care Plans list to review or modify the plan.

7. Select the Save button on the upper-right hand of the REM CMP panel.

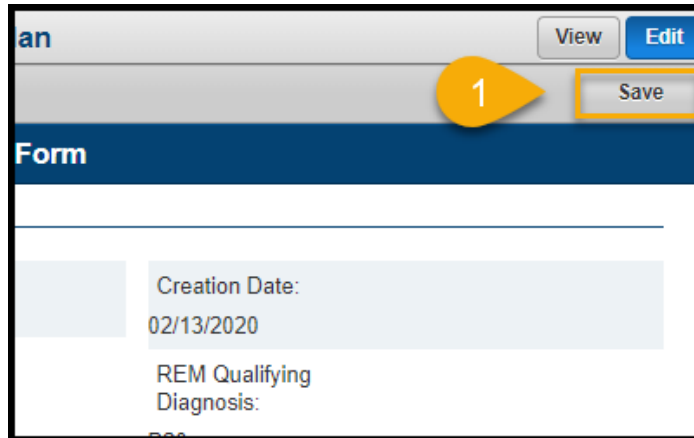


Figure 246- REM Care Plan Form Save

8. Select Submit for Supervisor Review to forward the REM CMP to supervisor review. The plan will be set to “Pending CMA Supervisor Review” status.
9. The CMA REM Supervisor selects the **Approve** button to activate the REM CMP. The CMA supervisor may also select **Clarification Request** to return the plan to the originator with questions or comments.

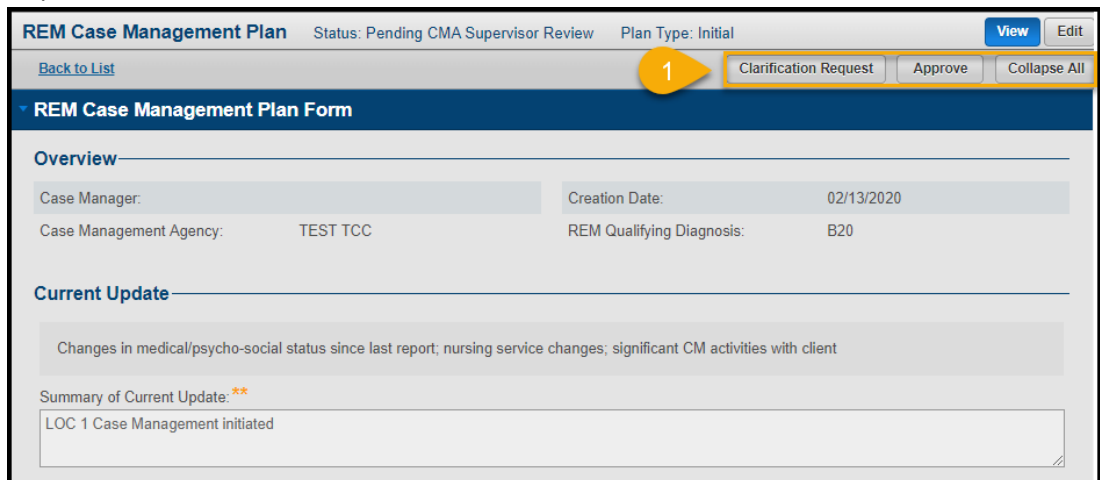


Figure 247- REM Care Plan Form Approval

10. The CMA REM Supervisor selects the **Yes** button to confirm approval.



Figure 248- REM Care Plan Form Approval Confirmation

11. Select the **Back to List** hyperlink to return to the REM Case Management Plan list.

15.6 Edit a REM Case Management Plan

Users may edit REM CMP plans that have been set to "In Progress" or "Pending CMA Supervisor Review, Clarification Requested."

15.6.1 Primary Actors

Department	Roles
MDH	REM Administrator
Assigned CMA	CMA REM Administrator, CMA REM Supervisor, CMA REM Case Manager, CMA REM Intake Specialist, CMA REM Provider Relations Rep

Table 34-Edit REM Care Plan Form - Primary Actors

1. From the Client Details tab, select the **Programs** banner on the left navigation.
2. Select **REM Case Management Plan**.
3. System navigates the screen to **REM Case Management Plan - List** page.
4. Under the "Actions" column of the appropriate REM CMP, select the **Edit** hyperlink.

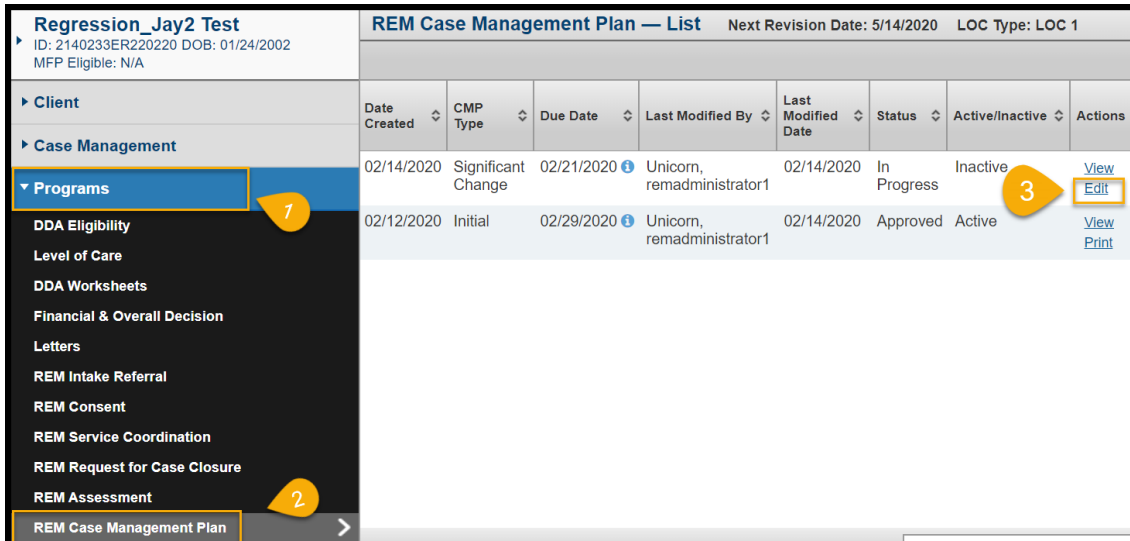


Figure 249- REM Case Management Plan List Edit

5. Make the desired changes to the REM CMP, then select the **Save** button.

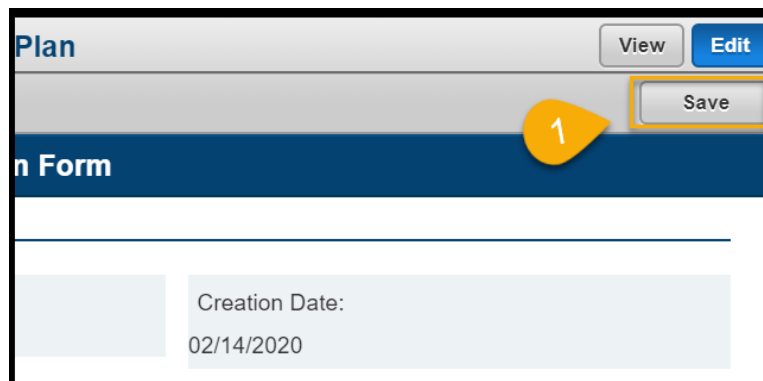


Figure 250- REM Case Management Plan List- Save Button

6. Once the CMA user has saved the form, they can submit the form by selecting the **Submit for Supervisor Review** button.
 - The user may also select the **Discard** button to discard the plan.

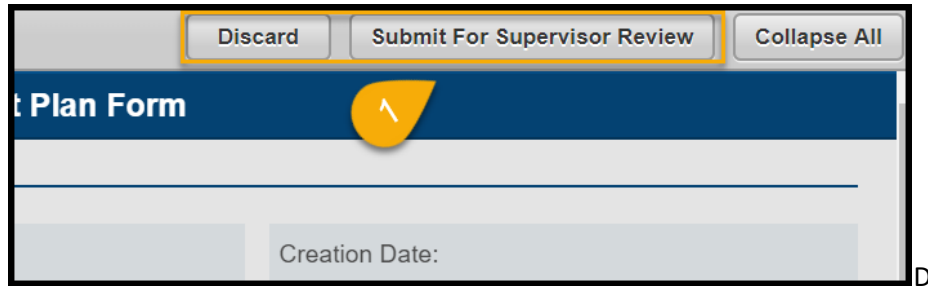


Figure 251- REM Case Management Plan List Discard/Submit Buttons

15.7 List/View a Case Management Plan

15.7.1 Primary Actors

Department	Roles
MDH	MDH REM Intake Nurse, MDH REM Administrator, MDH REM Intake Specialist, MDH REM Physician Advisor
Assigned CMA	CMA REM Administrator, CMA REM Supervisor, CMA REM Case Manager, CMA REM Intake Specialist, CMA REM Provider Relations Rep

Table 35-List/View REM Care Plan Form List or View - Primary Actors

1. From the Client Details tab, select the **Programs** banner on the left navigation.
2. Select **REM Case Management Plan**.
3. System navigates the screen to **REM Case Management Plan - List** page.
4. Under the “Actions” column of the appropriate CMP, select the **View** hyperlink.

- The system generates the CMP in view-only mode. To return to the REM CMP list, select the **Back to List** hyperlink.

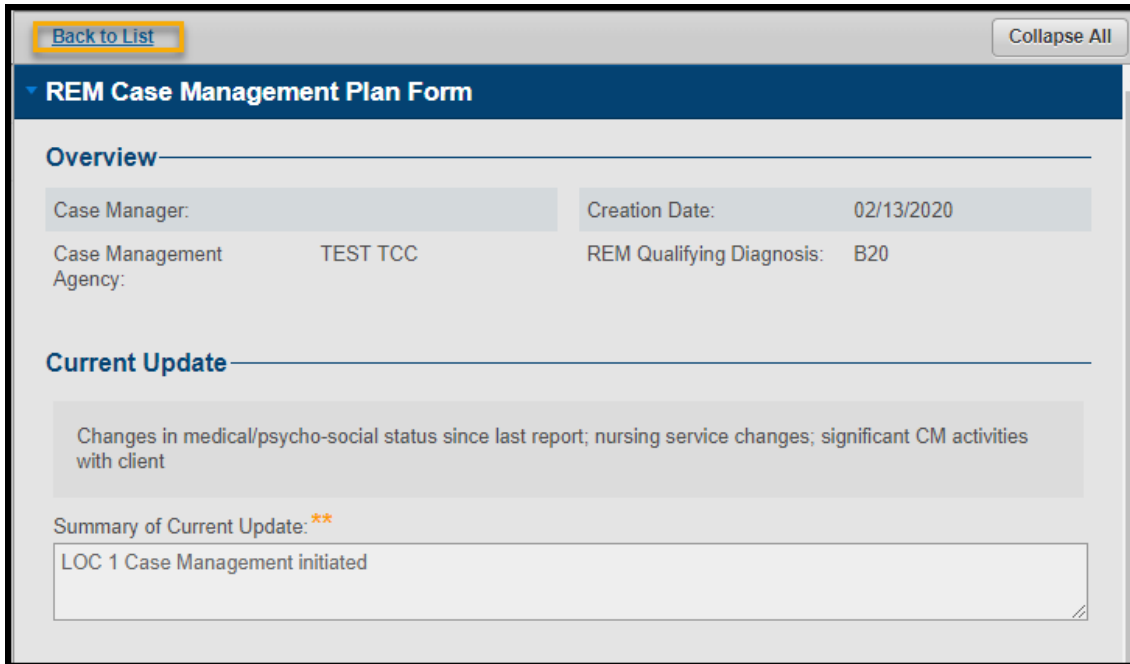


Figure 252- REM Care Plan Form Back to List Hyperlink

15.8 Print the REM Case Management Plan

15.8.1 Primary Actors

Department	Roles
MDH	MDH REM Intake Nurse, MDH REM Administrator, MDH REM Intake Specialist, REM Physician Advisor
Assigned CMA	CMA REM Administrator, CMA REM Supervisor, CMA REM Case Manager, CMA REM Intake Specialist, CMA REM Provider Relations Rep

Table 36-Print REM Care Plan Form - Primary Actors

- From the Client Details tab, select the **Programs** banner on the left navigation.
- Select **REM Case Management Plan**.
- System navigates the screen to **REM Case Management Plan - List** page.

- Under the “Actions” column of the appropriate REM CMP, select the **View** hyperlink.

Regression_Jay12 Test ID: 2239914ER149100 DOB: 02/03/1999 MFP Eligible: N/A		REM Case Management Plan — List							Next Revision Date: N/A	LOC Type: Assessment LOC
Add Significant Change										
Client	Date Created	CMP Type	Due Date	Last Modified By	Last Modified Date	Status	Active/Inactive	Actions		
Case Management	02/13/2020	Significant Change	02/20/2020	Absolute, cmaremsupervisor1	02/13/2020	Approved	Active	View	Print	
Programs	02/13/2020	Initial	03/02/2020	Absolute, cmaremsupervisor1	02/13/2020	Approved	Inactive	View	Print	

Figure 253- REM Care Plan Form Print

- The system generates a PDF in a separate tab of your browser. Right-click on the PDF for a menu of options for managing the file, including **Save** as and **Print**. You may also access viewing and printing options by hovering the mouse over the PDF.

NOTE: Chrome is the recommended browser for LTSS/REM.

REM Case Management Plan Form

Overview

REM Participant Name: Regression_Jay12 Test	
Current MA #: 11411411411	DOB: 02/03/1999
Case Manager:	Creation Date: 02/13/2020
Case Management Agency: TEST TCC	REM Qualifying Diagnosis: B20

Current Update

Changes in medical/psycho-social status since last report; nursing service changes; significant CM activities with client

Summary of Current Update:
second

REM Care Plans

Date Identified	Issues/ Problems/ Opportunities	Expected Outcomes/ Goals	Expected Date for Goal	Barriers to Meeting Goals	Interventions	Goal Evaluation
-----------------	---------------------------------	--------------------------	------------------------	---------------------------	---------------	-----------------

Figure 254- REM Care Plan Form PDF

When finished with the file, close the browser tab.

16 REM My Lists

LTSSMaryland offers My Lists that allows users to quickly check on the status of cases in the REM work queue, offering a simple way to keep track of your caseload. Client can be accessed in the **My Lists** tab on the top menu ribbon of LTSS. Lists are grouped around four REM modules:

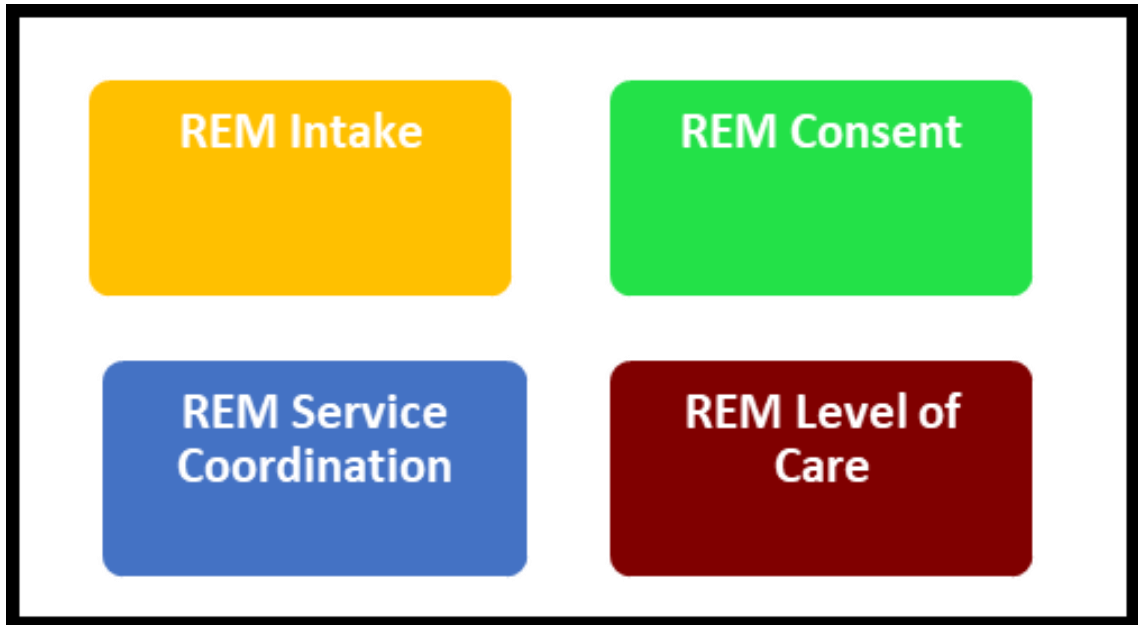


Figure 255-REM My List: Processes

Within each of these REM modules, there are filters that generate lists of cases which will display the progress of REM forms. These lists provide information such as cases pending Supervisor Reviews, MDH Reviews, as well as forms on hold or on which clarification has been requested, etc.

16.1 Primary Actors

Various My Lists are available to users based on their role. The user roles mentioned below are the users who have access to the respective My Lists. The filter list in every My List may vary based on the logged in user role.

- REM Intake
 - **MDH:** MDH REM Administrator, MDH REM Intake Nurse, MDH REM Intake Specialist
 - **Assigned CMA:** CMA REM Administrator, CMA REM Supervisor, CMA REM Case Manager, CMA REM Intake Specialist
- REM Consent
 - **MDH:** MDH REM Administrator, MDH REM Intake Nurse, MDH REM Intake Specialist
- REM Service Coordination
 - **MDH:** MDH REM Administrator, MDH REM Intake Nurse, MDH REM Intake Specialist

- **Assigned CMA:** CMA REM Administrator, CMA REM Supervisor, CMA REM Case Manager, CMA REM Intake Specialist
- REM Level of Care
 - **MDH:** MDH REM Intake Nurse, MDH REM Administrator, MDH REM Intake Specialist, MDH REM Physician Advisor
 - **Assigned CMA:** CMA REM Administrator, CMA REM Supervisor, CMA REM Case Manager, CMA REM Intake Specialist, CMA REM Provider Relations Rep

17 Accessing REM My Lists

This section provides instructions on how to review your work queue by using individual My List filters:

1. Select the **My Lists** tab on the top menu.
2. Select the desired My List from the left navigation panel.
3. System displays “show me” dropdown field.

NOTE: Access is granted to each My List based on the user’s role. See “My List – Primary Actors” above for more information.

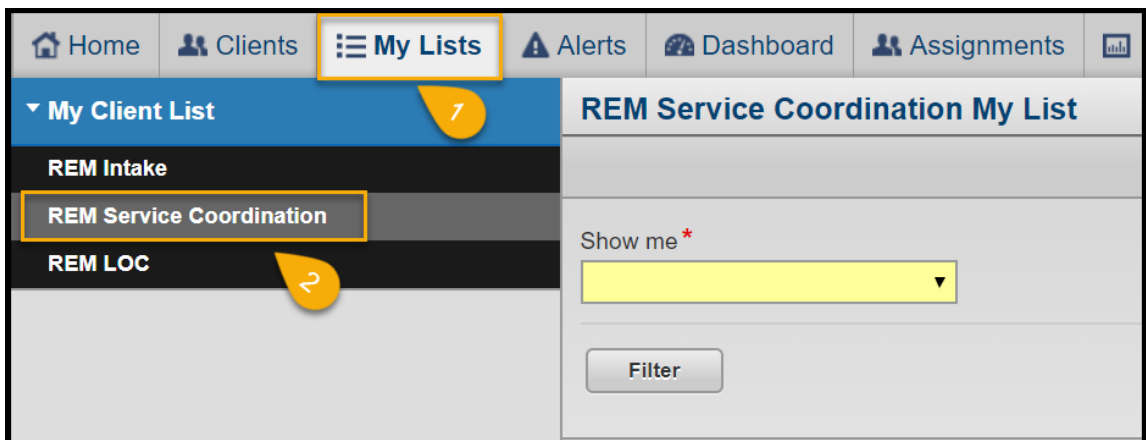


Figure 256-REM My List Service Coordination

4. Select the **Show me** dropdown. This generates a list of filter options. Click on the desired filter.

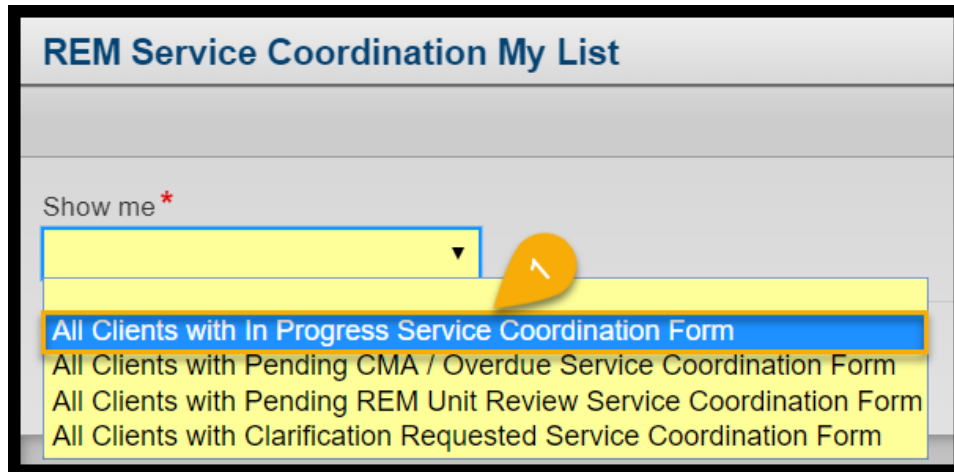


Figure 3-REM My List Service Coordination Dropdown

NOTE: Several filters require the user to provide additional information. For example, in the **All Clients with In-Progress or Offline Assessment** filter, the system requires the user to select if it wants the results to include “In Progress” or “Offline” (or both) results. The user must select at least one option.

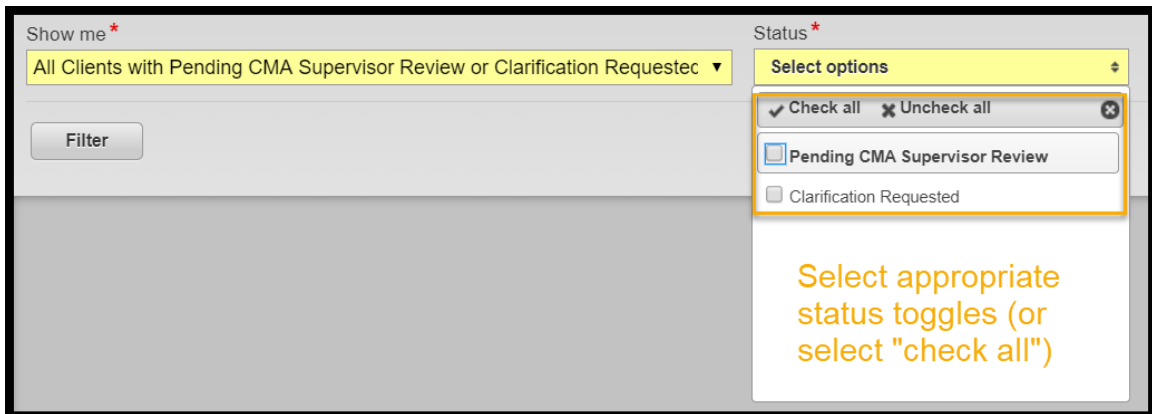


Figure 4-REM My List Status Drill Down Filters

NOTE: Selecting the **Uncheck all** status icon will deselect all toggles. The system will not, however, generate the list without at least one option to be selected.

For more information about REM lists, see the “REM My List Details” section below.

- Once you have selected the list dropdown (and additional drilldown options, if required), click the **Filter** button.

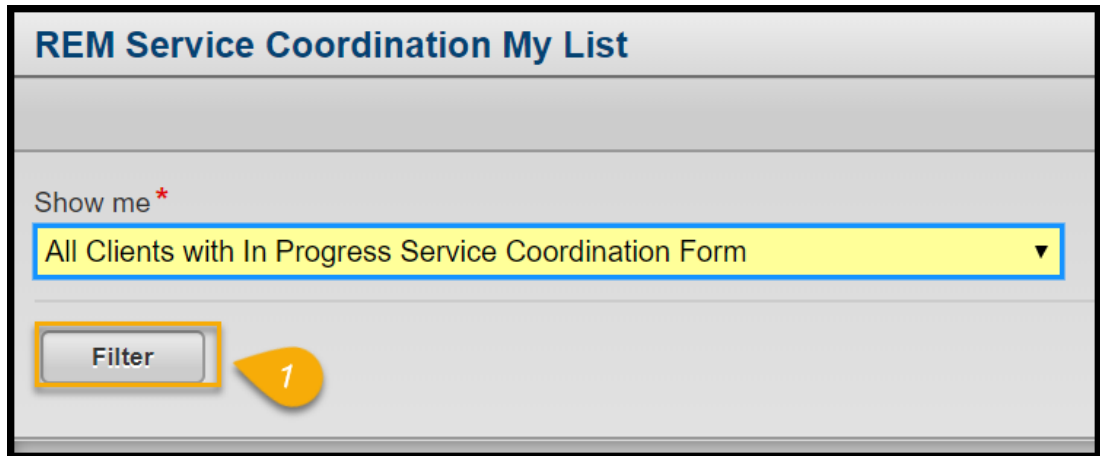


Figure 5-REM Service Coordination My List

- The system generates a list of records corresponding to the selected filter. If desired, you can filter the results further by entering text in the **Filter All Columns** field on the bottom-right section of the panel. Type in any string—such as a name or case manager—to return better targeted results.

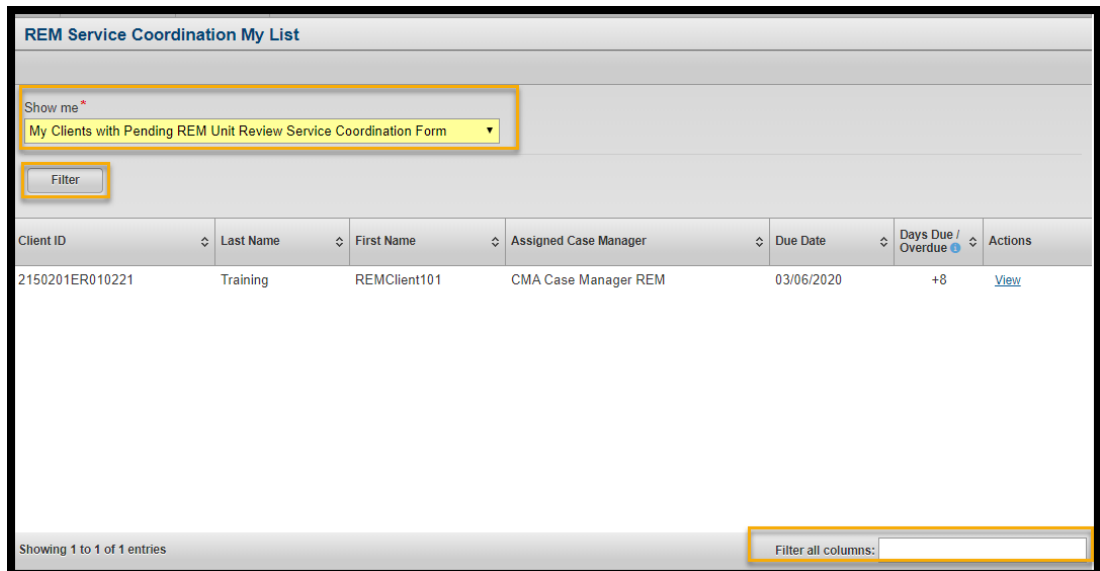


Figure 6-REM My List Filter All Columns

- To navigate to the desired record, select the **View** hyperlink under the “Actions” column. This directs the user to the selected form, allowing the user to review and process it.

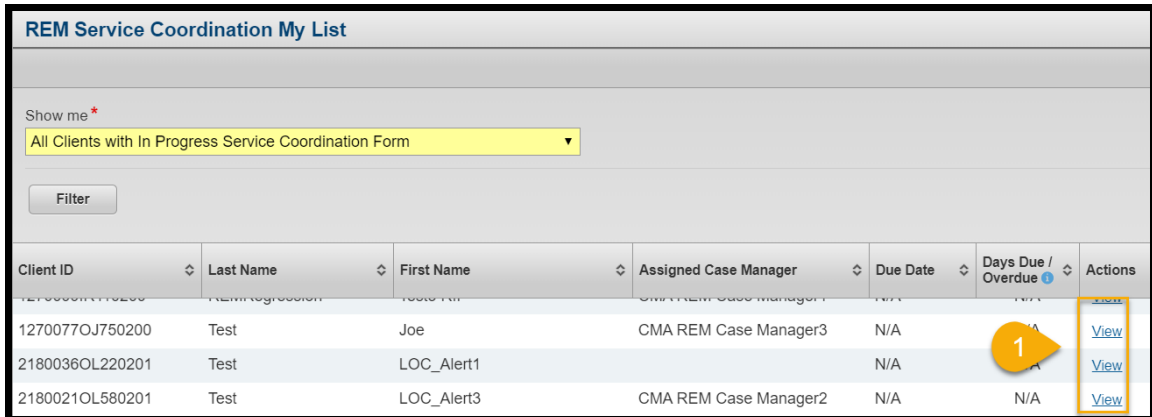


Figure 7-REM Service Coordination My List View Hyperlink

18 REM My List Details

The sections below provide a summary of the available REM My Lists and their filter options called “Show Me”.

18.1 REM Intake Form My List

The REM Intake Form My List offers a set of filters called “Show Me options” that enables users to monitor REM Intake forms in various status. Each filter corresponds to a different status in the REM Intake Form workflow.

Access to My List filters is role-based. The applicable users will be from the following 2 groups:

- **MDH:** MDH REM Administrator, MDH REM Intake Nurse, MDH REM Intake Specialist
- **Assigned CMA:** CMA REM Administrator, CMA REM Supervisor, CMA REM Case Manager, CMA REM Intake Specialist

18.1.1 REM Intake Form – Show Me options and List Columns

1. The user may select from the following Show Me options:

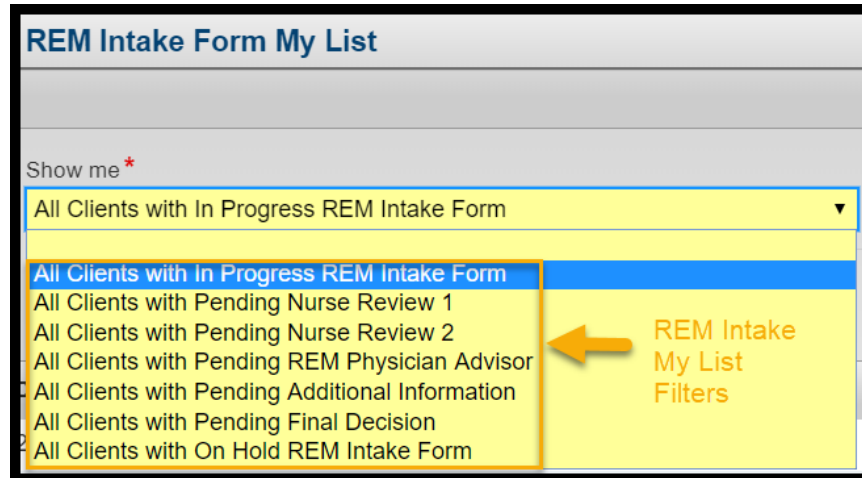


Figure 8-REM REM Intake Form My List

2. Upon selection of a Show Me option system will display the results in the list page.

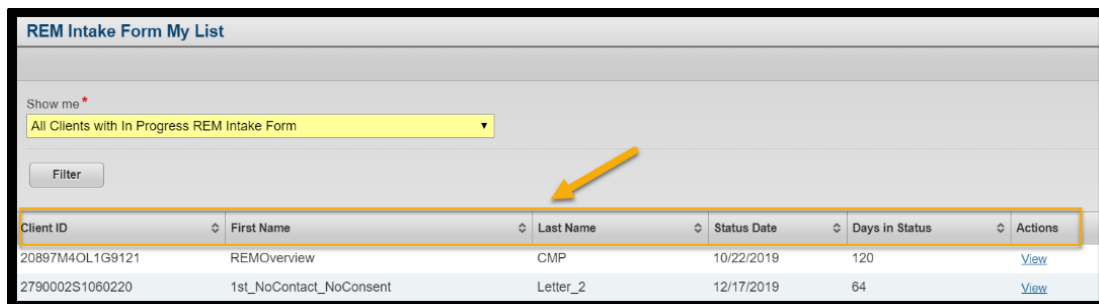


Figure 9-REM Intake Form My List Data Columns

3. List Page will display the relevant fields for the My List.
4. **Status Date** field on the List Page displays a date the respective REM Intake Referral transitioned into that status.
5. **Days in Status** field on the List Page displays the number of days the respective REM Intake Referral has been in that status.
6. **Actions** field on the List Page displays a hyperlink "View", which upon use redirects the screen to the respective REM Intake Referral Summary Page.

Show Me options:

- All Clients with In Progress REM Intake Form
 - Upon selection of this option, system will display a list of all the Clients who have a REM Intake Form in “In Progress” status.
 - MDH and CMA users will have access to this show me option.
 - CMA Users will only see results for the Clients assigned to them.
- All Clients with Pending Nurse Review 1
 - Upon selection of this option, system will display a list of all the Clients who have a REM Intake Form in “Pending Nurse Review 1” status.
 - MDH users will have access to this show me option.
- All Clients with Pending Nurse Review 2
 - Upon selection of this option, system will display a list of all the Clients who have a REM Intake Form in “Pending Nurse Review 2” status.
 - MDH users will have access to this show me option.
- All Clients with Pending REM Physician Advisor
 - Upon selection of this option, system will display a list of all the Clients who have a REM Intake Form in “Pending REM Physician Advisor” status.
 - MDH users will have access to this show me option.
- All Clients with Pending Additional Information
 - Upon selection of this option, system will display a list of all the Clients who have a REM Intake Form in “Pending REM Physician Advisor” status.
 - MDH users will have access to this show me option.
- All Clients with On Hold REM Intake Form
 - Upon selection of this option, system will display a list of all the Clients who have a REM Intake Form in “On Hold” status.
 - MDH users will have access to this show me option.

18.2 REM Consent My List

The REM Consent My List offers two (2) Show Me options that will display the list of Clients who either have a REM Consent Form in In Progress status or a Client has an approved an active REM Intake Referral but doesn't have a REM Consent form started yet.

The following users have access to this My List and both Show Me Options:

- **MDH:** MDH REM Intake Specialist, MDH REM Administrator, MDH REM Intake Nurse

18.2.1 All Clients with In Progress REM Consent Form

This filter lists all Clients associated with an “In Progress” REM Consent Form. In addition to summarizing identifying information, it displays the date the form was set to “In Progress” and the number of days it has been in this status.

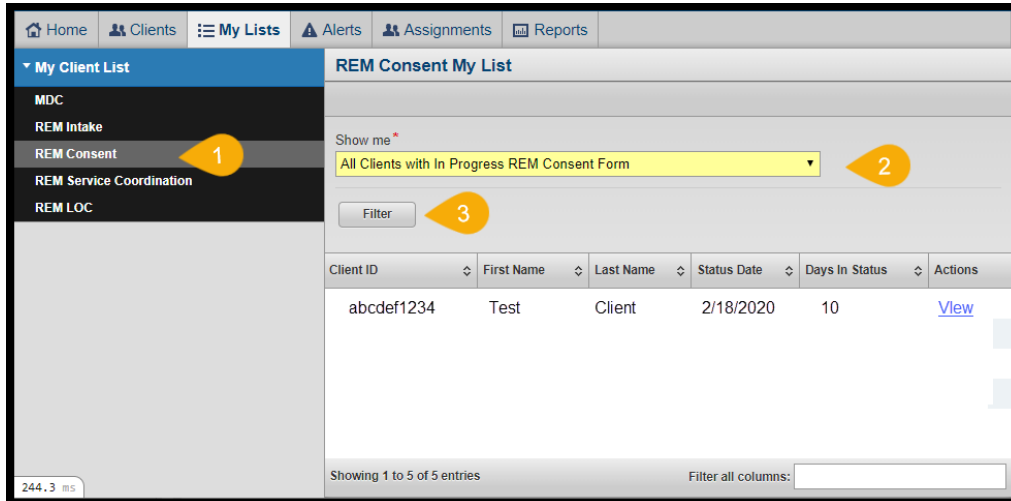


Figure 257-My Lists: All Clients with in Progress REM Consent Form

18.2.2 All Clients with Approved REM Intake Form but no REM Consent Form started

This filter lists all Clients associated who have an Approved and Active REM Intake Referral but does not have a REM Consent Form started yet. In addition to summarizing identifying information, it displays the Status Date and Days in Status fields.

- Status Date – system displays message: “For “All Clients with Approved REM Intake Form but no REM Consent Form started” this will display REM Intake Approval dated”
- Days in Status – system displays message: For “All Clients with Approved REM Intake Form but no REM Consent Form started” this will display the # of days from REM Intake Approval date to current system date.

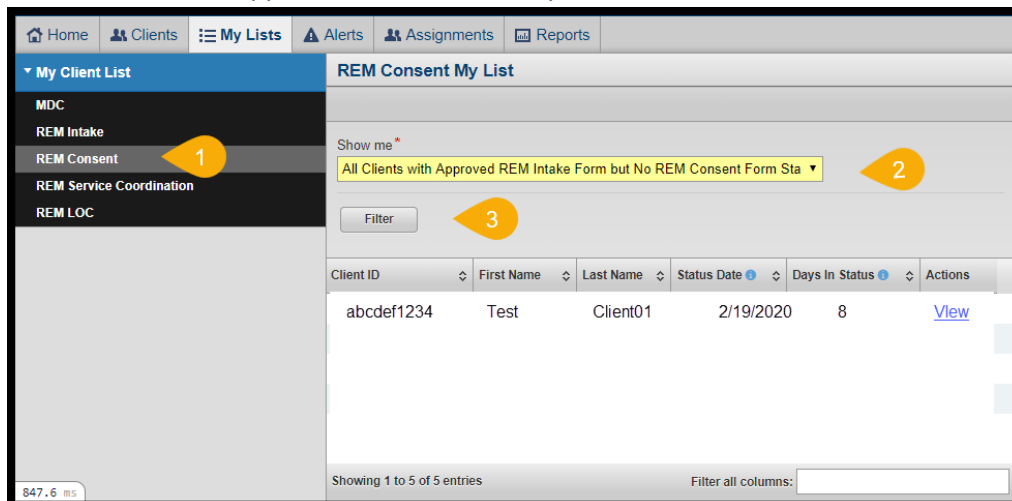


Figure 11-My Lists: All Clients with in Progress REM Consent Form

18.3 REM Service Coordination My List

The purpose of this My List is to allow users to get a visibility in their work queue for Service Coordination Forms and how an authorized actor can generate the My List for various scenarios of Service Coordination Form.

Access to My List filters is role-based. The applicable users will be from the 2 following 2 groups:

MDH: MDH REM Administrator, MDH REM Intake Nurse, MDH REM Intake Specialist

Assigned CMA: CMA REM Administrator, CMA REM Supervisor, CMA REM Case Manager, CMA REM Intake Specialist

NOTE: Assigned CMA user roles will only be able to see results of the Clients assigned to their agency.

18.3.1 REM Service Coordination Form – Show me options and List Columns

- The user may select from the following Show Me options:

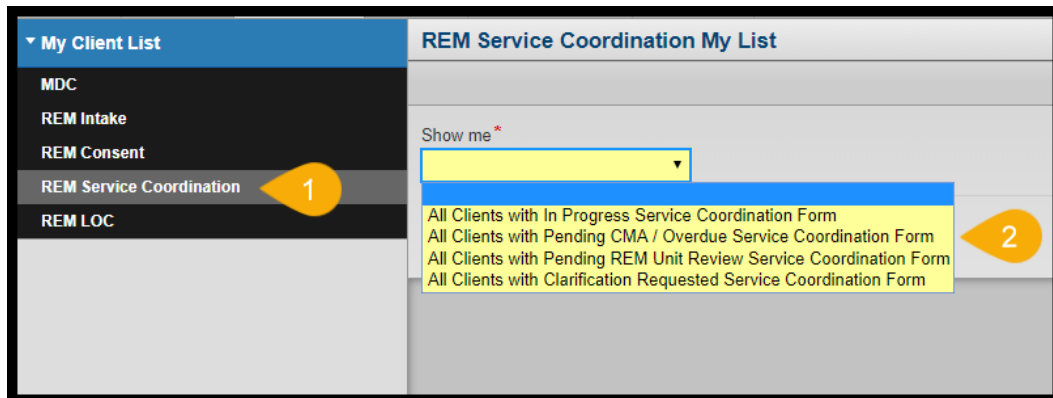


Figure 12-My Lists: Show Me options

- Upon selection of a Show Me option system will display the results in the list page.

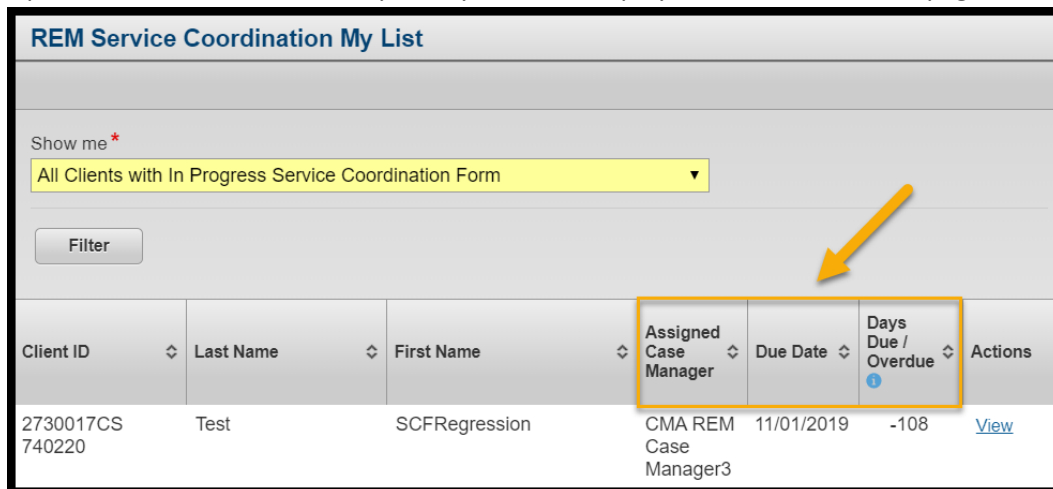


Figure 13-My Lists: All Clients with Pending CMA/Overdue Service Coordination Form

3. List Page will display the relevant fields for the My List.
4. **Due Date** field on the List Page displays the Due Date for the respective REM Service Coordination Form.
5. **Days Due/Overdue** field on the List Page displays the number of days the respective Service Coordination Form is Due or Overdue By. Negative values denote the Overdue Days.
6. **Actions** field on the List Page displays a hyperlink “View”, which upon use redirects the screen to the respective REM Service Coordination Form Summary Page.

Show Me options:

- All Clients with In Progress Service Coordination Form
 - Upon selection of this option system will display a list of all the Clients who have a REM Service Coordination Form in “In Progress” status.
- All Clients with Pending CMA/ Overdue Service Coordination Form
 - Upon selection of this option system will display a list of all the Clients who have a REM Service Coordination Form in either “Pending CMA” or “Overdue” status.
- All Clients with Pending REM Unit Review Service Coordination Form
 - Upon selection of this option system will display a list of all the Clients who have a REM Service Coordination Form in “Pending REM Unit Review” status.
- All Clients with Clarification Requested Service Coordination Form
 - Upon selection of this option system will display a list of all the Clients who have a REM Service Coordination Form in “Clarification Requested” status.

18.4 REM LOC My List

The purpose of this My List is to allow the users to generate the list of Clients pending LOC in any open status such as In Progress, Pending CMA Supervisor Review, etc. User can generate the list and then complete the LOC for any open case.

Access to My List filters is role-based. The applicable users will be from the following two groups:

MDH: MDH REM Intake Nurse, MDH REM Administrator, MDH REM Intake Specialist, MDH REM Physician Advisor

Assigned CMA: CMA REM Administrator, CMA REM Supervisor, CMA REM Case Manager, CMA REM Intake Specialist, CMA REM Provider Relations Rep

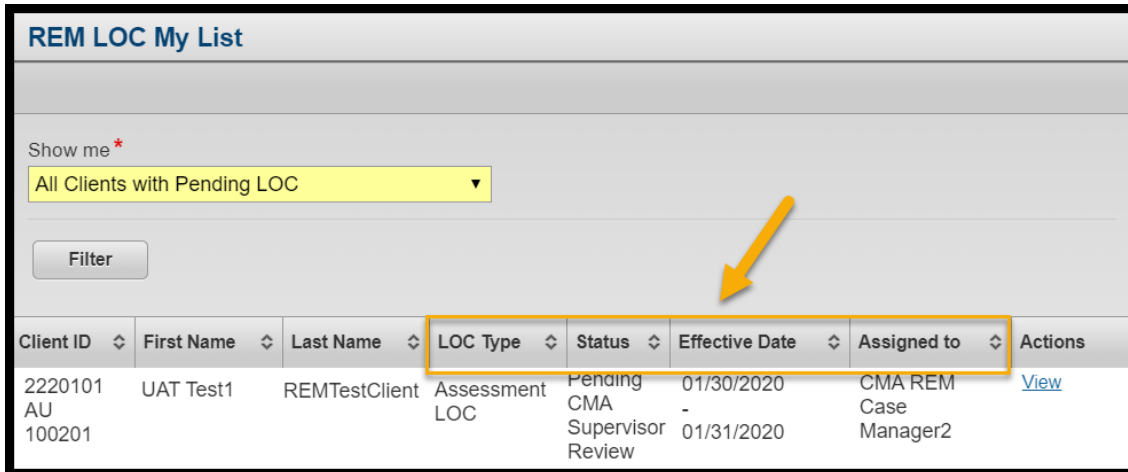


Figure 14-My Lists: All Clients LOC My List

18.4.1 All Clients - My List LOC Show Me Options and List Page

The following Show Me Options will be in All Clients LOC My List:

- All Clients with Pending LOC
 - This option is only for the CMA users: CMA REM Administrator, CMA REM Supervisor.
 - Upon use this will display list of the Clients assigned to the CMA agency who are enrolled in REM program and their LOC for the current month (System month) has not been approved yet.
 - Any LOC in the status of "In Progress", Clarification Requested", or "Pending CMA supervisor Review" will be displayed as a result of this Show Me option.
- All Clients with Pending CMA Supervisor Review or Clarification Request
 - This option is only for the CMA users: CMA REM Administrator, CMA REM Supervisor.
 - This will display list of the Clients who are enrolled in the REM program and their LOC is in a status on Pending CMA Supervisor Review or Clarification Request and assigned to their CMA agency.
- All Clients with Overdue LOC
 - This option is only for the following MDH REM users: REM Intake Nurse, REM Administrator, REM Intake Specialist, REM Physician Advisor.
 - This will display list of the Clients who are enrolled in the REM Program, but their LOC has not been completed for the previous month.
- All Clients that are Overdue
 - This option is only for the CMA Users: CMA REM Administrator, CMA REM Supervisor, CMA REM Provider relation rep, CMA REM Intake Specialist

- This will display list of the Clients who are assigned to the agency, are enrolled in REM program and there LOC is overdue.
1. Upon use of any of these options system displays the REM LOC My List Page.
 2. The List Page will display the relevant fields for the My List.

18.4.2 My Clients – My List LOC

The following Show Me Options will be in All Clients LOC My List:

- My Clients with “In Progress” LOC
 - This option is only for the Assigned CMA: CMA REM Administrator, CMA REM Supervisor, CMA REM Case Manager, CMA REM Intake Specialist, CMA REM Provider Relations Rep.
 - This will display list of the Clients enrolled in REM program and their LOC is in the status of "In Progress."
 - CMA REM Case Managers will only be able to see the Clients assigned to them.
- My Clients with Pending CMA Supervisor Review or Clarification Requested.
 - This option is only the Assigned CMA: CMA REM Administrator, CMA REM Supervisor, CMA REM Case Manager, CMA REM Intake Specialist, CMA REM Provider relations rep
 - This will display list of the Clients enrolled in REM program with their LOC in a status of either Pending CMA Supervisor Review or Clarification Requested and assigned to the user.
 - CMA REM Case Managers will only be able to see the Clients assigned to them.
- My Clients that are overdue
 - This option is only for the Assigned CMA: CMA REM Supervisor, CMA REM Case Manager.
 - This will display list of the Clients enrolled in REM program and their LOC is overdue and haven't been submitted for the previous month.
 - CMA REM Case Managers will only be able to see the Clients assigned to them.

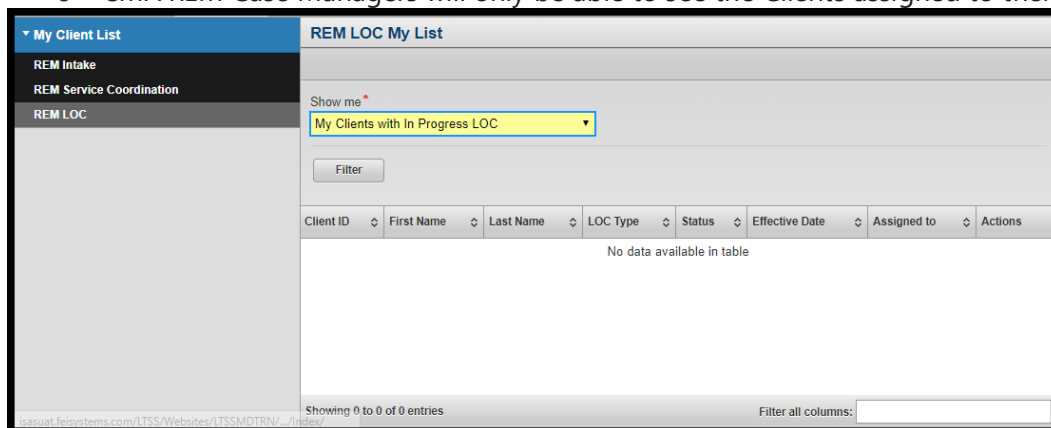


Figure 15- LOC My Lists: My Clients Example

3. Upon use of any of these options system displays the REM LOC My List Page.
4. List Page will display the relevant fields for the My List.

19 REM Letters

REM letters are used to communicate pertinent decisions to Client/family and providers or to solicit medical information from healthcare providers. Letters are sent at various stages of the REM intake application processes to inform individuals of the determination of their eligibility, as well as offering instructions for additional steps to be taken—such as giving consent or initiating an appeals process if they are found to be ineligible for the REM program.

LTSS letters incorporate Client and clinical information to automate correspondence processes as much as possible. Because of this, users are only required to select a small number of dropdowns to produce full letters ready to be sent by mail, fax, or email. **LTSS cannot automatically transmit REM letters.**

Before generating a letter, the system assures that all preconditions are first in place. Preconditions for each letter, if any, are described in more detail in the “REM Letter Types” section below.

If preconditions are in place, the user creates the letter and the system generates a form; this form prepopulates information based on the Client records. The user must complete several dropdown and/or toggle fields and then submit the letter. The system will then generate a PDF document that can be distributed by the user via mail, fax, or email.

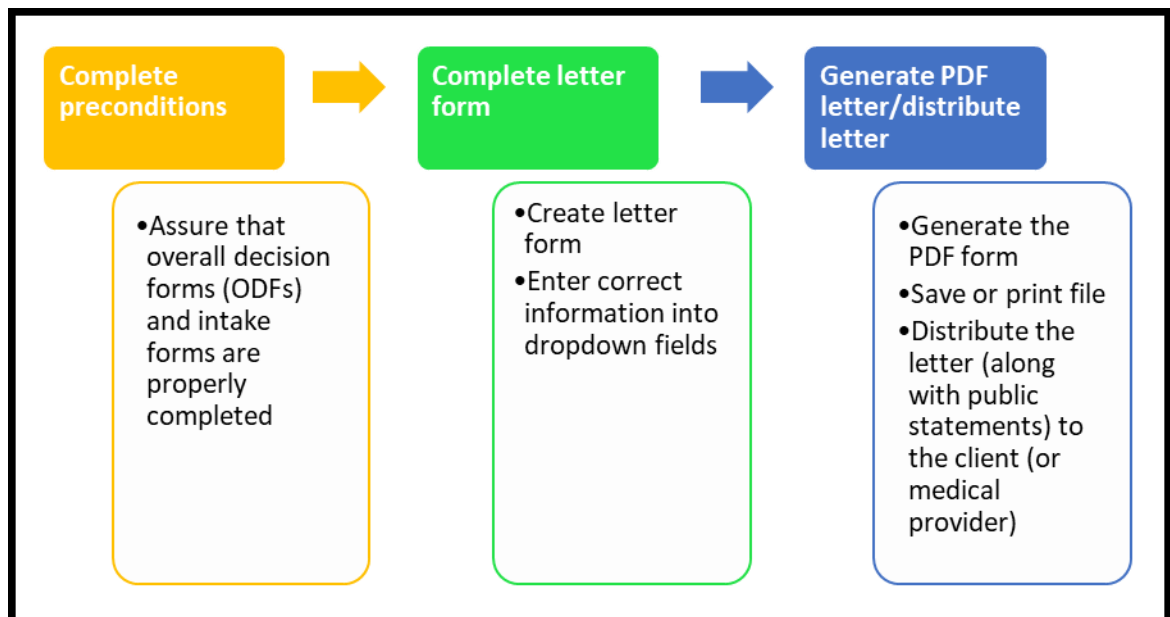


Figure 258-REM Letters Workflow

19.1 Types of REM Letters

LTSS can produce letters for multiple scenarios relating to consent, eligibility determination, and disenrollment. The system can also generate a letter to medical providers requesting additional information. Built-in letters available in the system are as follows:

1. First Contact No Consent
2. Second Contact No Consent
3. Final Contact No Consent
4. First No Contact No Consent
5. Second No Contact No Consent
6. Final No Contact No Consent
7. Approval
8. Request for Additional Medical Information
9. Applicant Denial
10. Decline – Remain in MCO
11. Reconsideration Approval
12. Reconsideration Denial
13. Notice of REM Disenrollment Due to Age Out
14. Notice of REM Disenrollment for Participation in REM
15. Notice of REM Disenrollment – Return to MCO

NOTE: Additional letters may be added to the system later.

19.2 Attached Public Statements

Generated letters are accompanied by two notices that offer important information about Client rights and language accessibility services. These public statements should be included in all correspondence with Clients. These are summarized below:

1. **Language Accessibility Statement:** This letter notifies Clients of their language accessibility rights, as well as advising Clients about available language translation and communication augmentation services.
2. **Notice to the Public Non-Discrimination Statement and Accessibility Requirements:** This letter informs Clients that the Maryland Department of Health (MDH) complies with all state and federal civil rights laws; the statement also offers guidance on available resources for Clients requiring accommodations in order to access services

19.3 Primary Actors

Department	Roles
MDH REM	MDH REM Administrator, MDH REM Intake Specialist, MDH REM Intake Nurse

Table 37-REM Letters - Primary Actors

19.4 Create New REM Letter

Once you have selected the appropriate Client’s record, follow these steps to generate a REM letter:

1. Select **Letters** under the **Programs** banner on the left navigation panel.

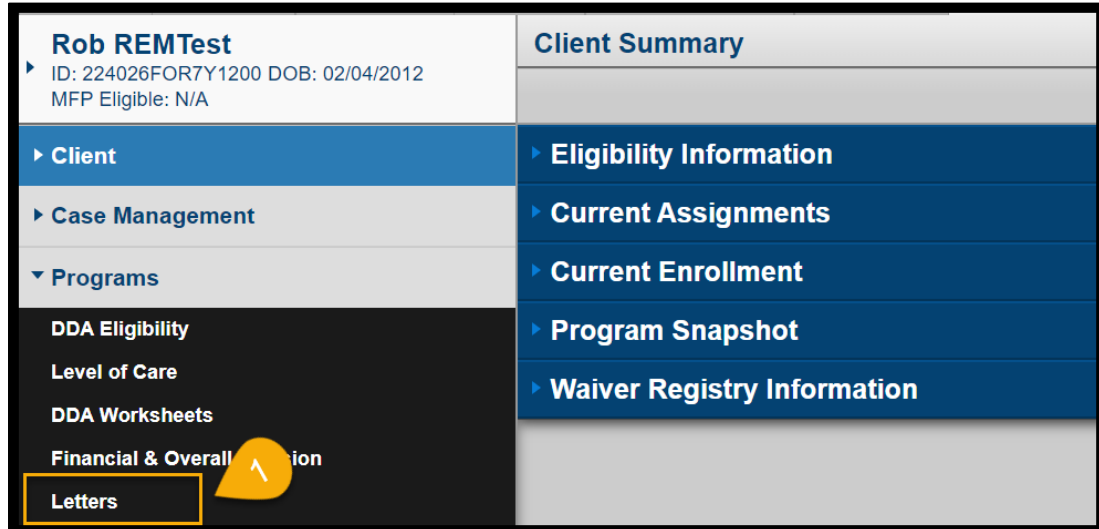


Figure 259-Select REM Letters

2. The system generates a list of letters. On the REM Letters panel, select the **Manage** button on the right-hand side of the letters panel.

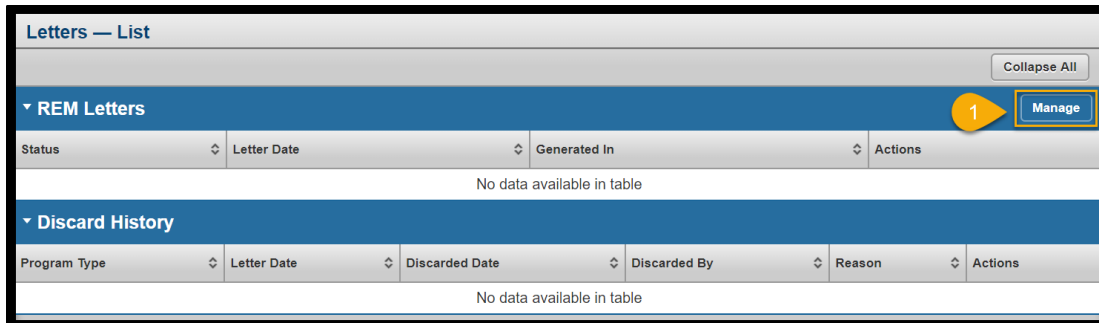


Figure 260-Manage REM Letters

- 3. The system generates a list of letters associated with the Client. Select the desired REM letter type in the **Create New Letter** dropdown. (To return to the letters list, select the **Back to List** hyperlink.)

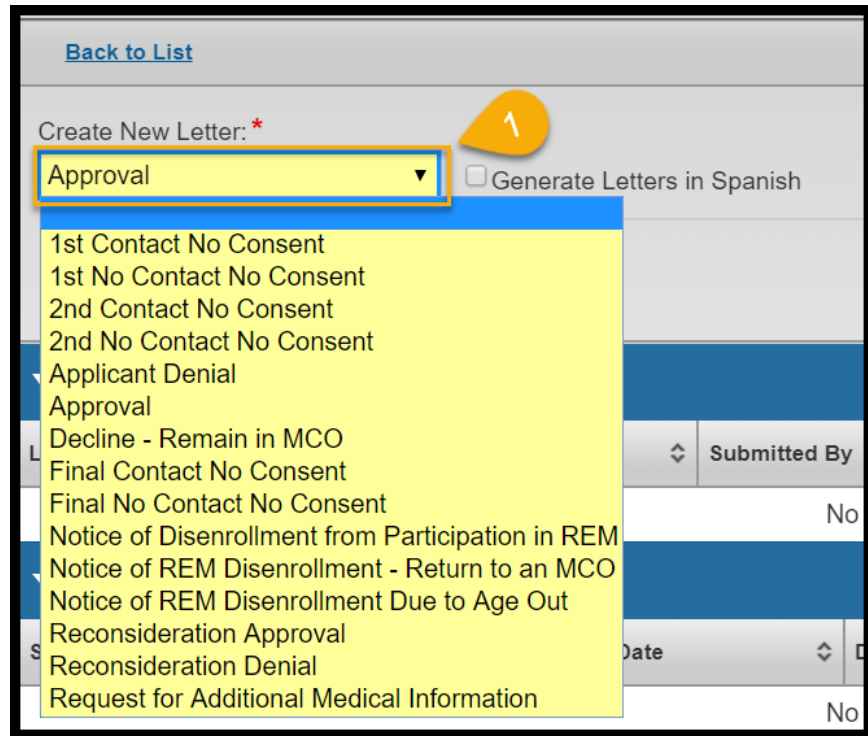


Figure 261-Letters Dropdown

- 4. Select the **Create** button.

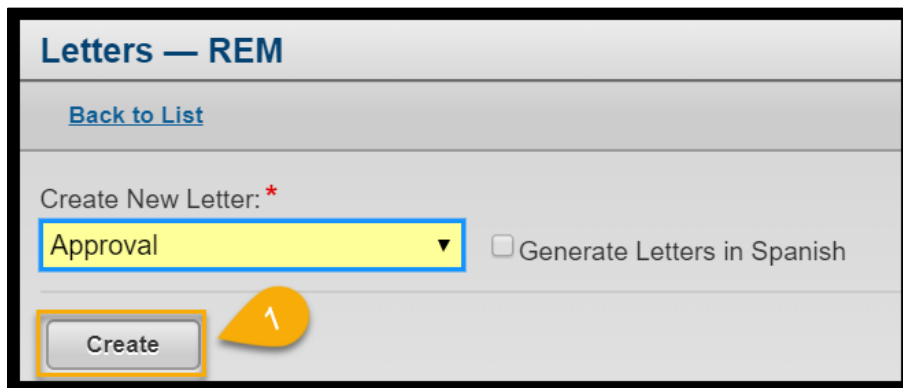


Figure 262-REM Letters – Create

- The system generates a form for the type of letter selected; the content will be customized to the Client’s information. Enter the appropriate responses in the dropdown or text fields. Required data entry fields are shaded in yellow. (NOTE that each type of letter will require different information from the user.)

NOTE: If you select “Authorized representative” in the address field, an additional field will auto-populate to produce a care of (C/O) address. Also, to create a carbon copy of the letter, select the cc: toggle on the lower-left hand side of the letter.

Figure 263-REM Compose Letter

- Click the **Submit** button on the upper right-hand side of the letter panel.

Figure 264-Submit REM Button

NOTE: Except for the Request for Additional Medical Information letter, all letters can be generated in Spanish. To create a Spanish-language letter, select the **Generate Letters in Spanish** toggle while creating a new letter.

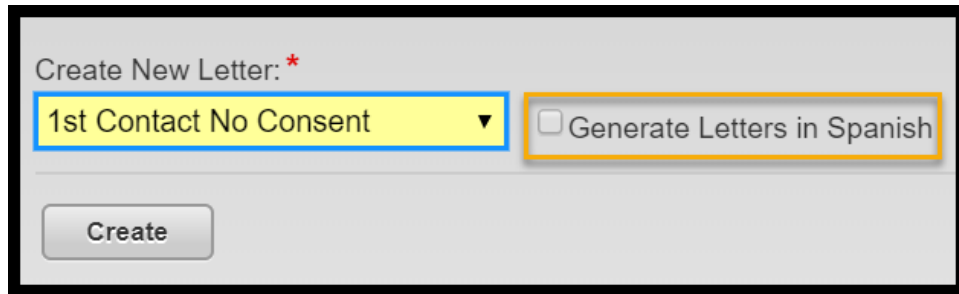


Figure 265-REM Letters – Generate Letters in Spanish

7. A PDF letter will now be generated in a separate tab on the user’s browser; the letter will also be added to the REM Letters List.

19.5 View or Print a REM Letter

Follow these steps to **View** or **Print** a REM letter in the REM Letters List:

1. Navigate to the desired Client.
2. Select **Letters** under the **Programs** banner within the left navigation panel.

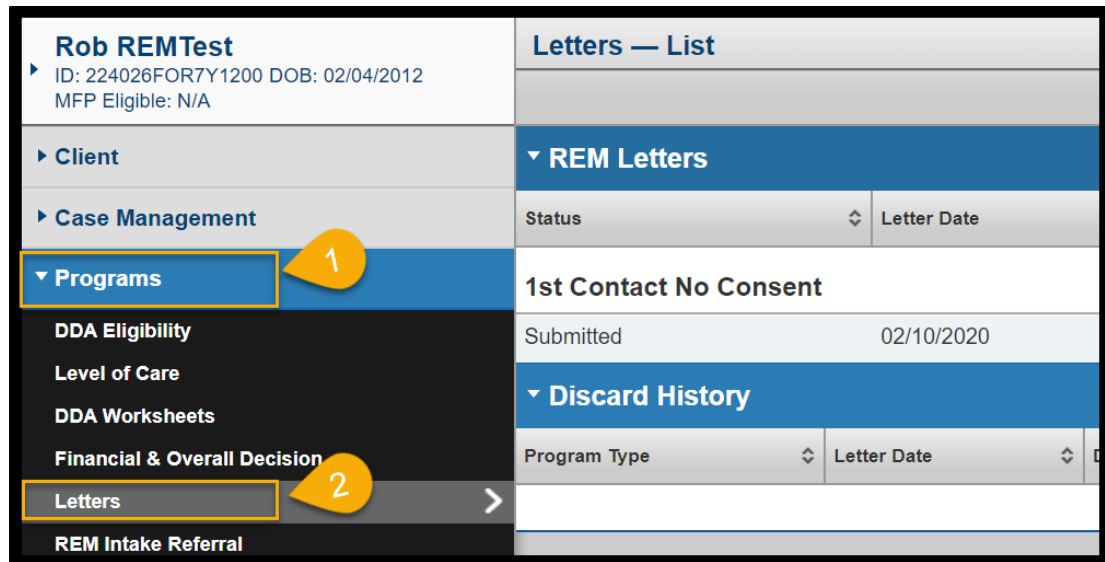



Figure 266-REM Letters Panel

NOTE: If the letters are not visible, you may have to select the arrow  icon to expand the view.

3. Select the appropriate letter from the list and select the View hyperlink in the “Actions” column.

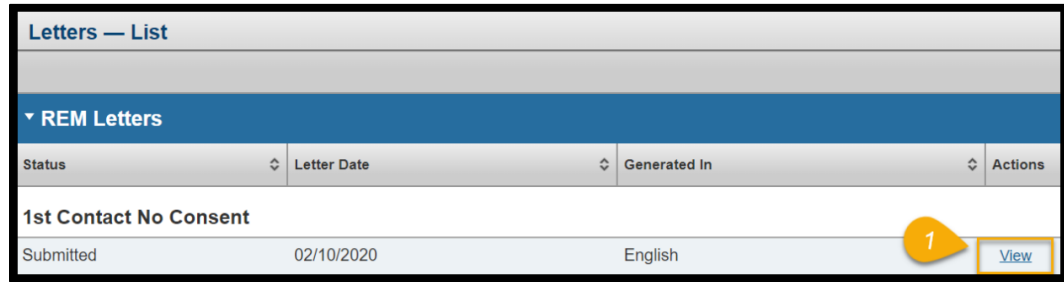


Figure 267- REM Letters List View

4. The system generates a PDF file in separate tab of your Internet browser. From here, right-click on the letter to save or print the file. Depending on your browser type, you may perform these functions by selecting print and download icons on the webpage. (To show these options, you may need to left-click the screen one time.) **NOTE: The recommended browser is Chrome.**

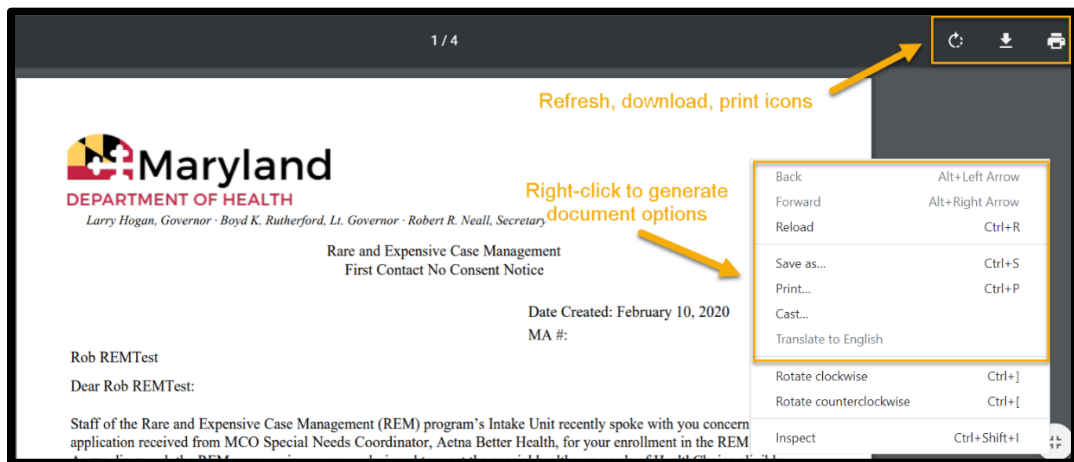


Figure 268-REM Letters View, Download, or Print

19.6 Discard REM Letters

Follow these steps to **Discard** a previously generated REM letter:

1. Navigate to the desired Client.
2. Select **Letters** under the **Programs** banner in the left navigation panel.

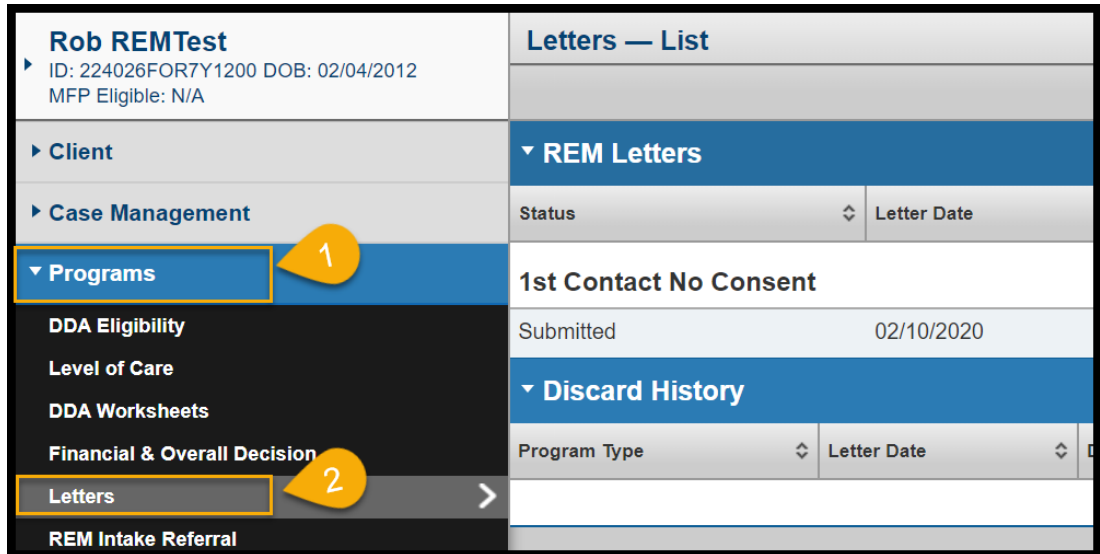



Figure 269-REM Letters Panel

NOTE: If the letters are not visible, you may have to select the arrow  icon to expand the view.

3. Click **Manage** on the **REM Letters** banner.

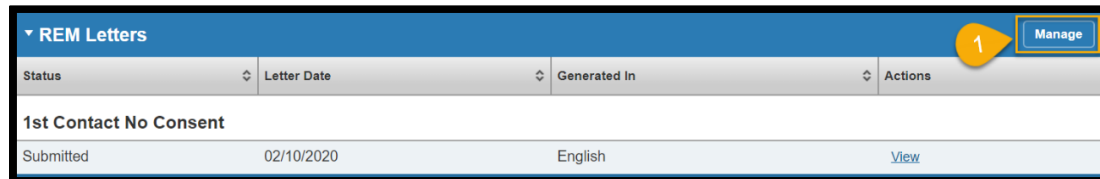


Figure 270-REM Letters – Manage

4. The system will generate a list of letters in manage view. Click on the **Discard** hyperlink under the “Actions” column.

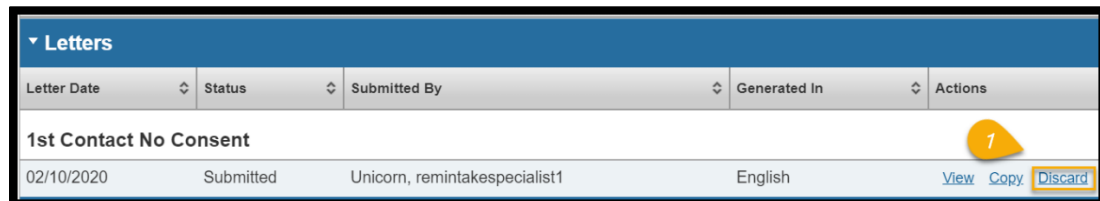


Figure 271-REM Letters – View Discard

- The system will generate a confirmation dialog box. Enter a comment describing the reason for discarding the record then click **Yes**.

Confirmation

Do you want to discard this record?

Comment: *

0 of 300 character limit

Yes No

Figure 272-REM Letters – Discard Confirmation

The system will generate a success message confirming that the letter has been discarded.

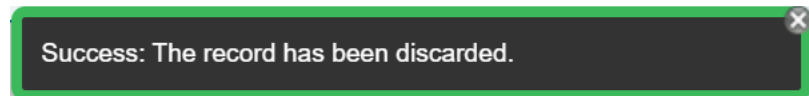


Figure 273-REM Letters – Success Message

Select on the **X** button to close the success message.

- The discarded letter will be added to the **Discard History** list at the bottom of the screen.

Letters					
Letter Date	Status	Submitted By	Generated In		
No data available in table					
Discard History					
Status	Letter Date	Discard Date	Discard By	Reason	Generated
1st Contact No Consent					
Discarded	02/10/2020	02/10/2020	Unicorn, remintakespecialist1	This letter was created in error.	Eng...

Figure 274-REM Letters – Discard History

19.7 REM Letter Types

The following section details REM letters available in LTSSMD, as well as the preconditions for each, as applicable.

19.7.1 First Contact No Consent

This letter notifies a Client that they were contacted, and their consent must be obtained to enroll in REM Program. The Client must contact the REM Intake Office within fourteen (14) calendar days of the letter date to discuss enrollment in the REM program. The application will be withdrawn if the Client does not contact the REM Intake Unit.

Preconditions: This letter can only be generated if there is an approved and active REM Intake Form.

Figure 275-First Contact No Consent Edit View

19.7.2 Second Contact No Consent

Purpose: The Second Contact No Consent Letter is used by the Intake Nurse or Intake Specialist to remind a Client that a request for consent had previously been sent and no response received. The letter asks the Client to contact the REM Intake Office to discuss consent for enrollment in the REM program—and warns the Client that the application will be withdrawn if he or she doesn’t contact the REM Intake Unit.

Preconditions: This letter can only be generated if there is an approved and active REM Intake Form.

Second Contact No Consent Form

Rare and Expensive Case Management
Second Contact No Consent Notice

Date Created: February 10, 2020
MA #:

Rob REMTest

Client

1

Dear Rob REMTest:

We recently sent you a letter asking you to call the Rare and Expensive Case Management (REM) program's staff to tell us your decision concerning your enrollment in REM. Unfortunately, we have not heard from you.

It is important that we talk to you to see if you choose to be enrolled in REM. As we discussed during our prior telephone conversation, REM is a program designed to meet the special healthcare needs of HealthChoice eligible individuals who have certain medical conditions.

Please call the REM Intake Unit's staff by February 24, 2020 to talk about this important issue. Our toll free number is 1-800-565-8190. If we do not hear from you, we will consider the REM application to be withdrawn.

Thank you in advance for your cooperation.

Sincerely,

2

cc: MCO

Figure 276-Second Contact No Consent Edit View

19.7.3 Final Contact No Consent

Purpose: This letter notifies the Client that their REM application has been withdrawn and denied due to lack of consent to participate. The letter **NOTES** that the REM Intake Unit has twice attempted to obtain consent for Enrollment in the REM program without response. It also informs the Client that he or she can request a Fair Hearing by notifying the MDH's Office of Administrative Hearings (OAH) within 90 days of the letter's date. The Client can then reapply for the REM program by contacting the REM Intake Unit.

Preconditions: This letter can only be generated if there is an approved and active REM Intake Form.

Final Contact No Consent Letter Form

Rare and Expensive Case Management
Final Contact No Consent Notice

Date Created: February 10, 2020
MA #:

Rob REMTest
Client

Dear Rob REMTest:

Staff of the Rare and Expensive Case Management (REM) program's Intake Unit recently spoke with you concerning an application received from MCO Special Needs Coordinat... Aetna Better Health, for your enrollment in the REM program. During this conversation, you stated that you would like some time to think about the program before choosing to be enrolled in REM.

As follow-up to our discussion, we recently sent you two (2) letters asking you to call us concerning your decision to enroll in the REM program. **To date, we have not heard from you and, therefore, have no choice but to consider the recent application withdrawn and therefore denied.** We will consider that you wish to receive your healthcare through your Managed Care Organization, Aetna Better Health.

Please note that another application for your enrollment into REM may be made at any time in the future. In order to reapply, you or someone on your behalf may call the REM Intake Unit at 1-800-565-8190.

You may request a fair hearing of this decision to the Maryland Office of Administrative Hearings (OAH) pursuant to COMAR 10.01.04 by writing within ninety (90) days of receipt of this letter to:

Maryland Department of Health
Attn: Appeals
201 W. Preston Street, 1st Floor
Baltimore, MD 21201

Please call the REM Intake Unit's staff at 1-800-565-8190 if you have any questions regarding this decision.

Sincerely,

cc: MCO

Figure 277-Final Contact No Consent Edit View

19.7.4 First No Contact No Consent

Purpose: This letter is used when the Intake Nurse has been unsuccessful in contacting the Client for fourteen (14) calendar days. This letter notifies the Client that (1) their REM application has been received and (2) asks the Client to contact the REM Intake Unit within fourteen (14) calendar days from the date of the letter to give consent to enroll in the REM program (or to decline participation).

Preconditions: This letter can only be generated if there is an approved and active REM Intake Form.

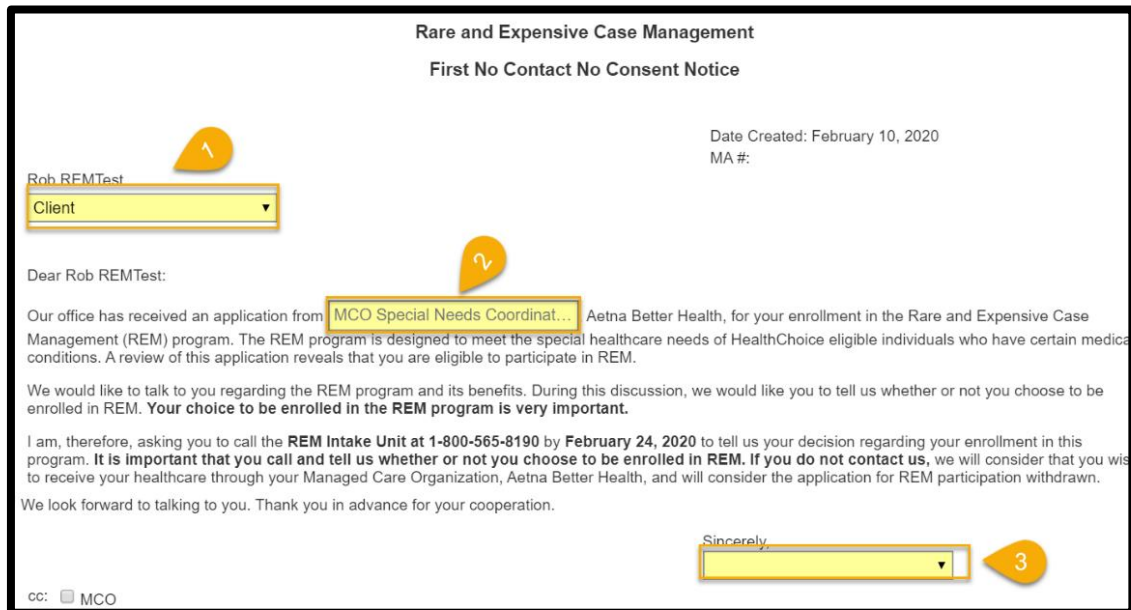


Figure 278- First No Contact No Consent Letter

19.7.5 Second No Contact No Consent

Purpose: This letter is a follow up to the First No Contact No Consent Letter. It notifies the Client of that (1) their REM application has been received by MDH and (2) that the Client has not contacted the REM Intake Unit. The Client is encouraged to contact the REM Intake to provide consent to receive REM services (or decline participation.)

Preconditions: This letter can only be generated if there is an approved and active REM Intake Form.

Second No Contact No Consent Form

Rare and Expensive Case Management
Second No Contact No Consent Notice

Date Created: February 10, 2020
MA #:

Rob REMTest
Client

Dear Rob REMTest:

Our office has received an application from MCO Special Needs Coordinat... Aetna Better Health, for your enrollment in the Rare and Expensive Case Management (REM) program. The REM program is designed to meet the special healthcare needs of HealthChoice eligible individuals who have certain medical conditions. A review of this application reveals that you are eligible to participate in REM.

We recently sent you a letter asking you to call the Rare and Expensive Case Management (REM) program's Intake Unit to talk about your enrollment in the REM program. Unfortunately, as of this date, we have not heard from you.

It is important that we talk to you to see if you choose to be enrolled in REM. This is a program designed to meet your special healthcare needs.

Please call the REM Intake Unit by February 24, 2020 to talk about this important issue. Our toll free number is 1-800-565-8190. If we do not hear from you, we will consider the application for REM participation to be withdrawn.

Thank you in advance for your cooperation.

Sincerely,
MCO

Figure 279-Second No Contact No Consent Letter

19.7.6 Final No Contact No Consent

Purpose: This is the final letter notifies the Client that they have been notified twice and warns that consent for REM services has not been provided by the Client—and therefore the REM application has been withdrawn and denied. The letter also notifies the Client that they can request a Fair Hearing by notifying the MDH’s Office of Administrative Hearings (OAH) within 90 days of this dated letter. The Client can reapply for the REM program by contacting the REM Intake Unit.

Preconditions: This letter can only be generated if there is an approved and active REM Intake Form.

Final Contact No Consent Letter Form

Rare and Expensive Case Management
Final Contact No Consent Notice

Date Created: February 10, 2020
MA #:

Rob REMTest
Client

Dear Rob REMTest:

Staff of the Rare and Expensive Case Management (REM) program's Intake Unit recently spoke with you concerning an application received from MCO Special Needs Coordinat... Aetna Better Health, for your enrollment in the REM program. During this conversation, you stated that you would like some time to think about the program before choosing to be enrolled in REM.

As follow-up to our discussion, we recently sent you two (2) letters asking you to call us concerning your decision to enroll in the REM program. **To date, we have not heard from you and, therefore, have no choice but to consider the recent application withdrawn and therefore denied.** We will consider that you wish to receive your healthcare through your Managed Care Organization, Aetna Better Health.

Please note that another application for your enrollment into REM may be made at any time in the future. In order to reapply, you or someone on your behalf may call the REM Intake Unit at 1-800-565-8190.

You may request a fair hearing of this decision to the Maryland Office of Administrative Hearings (OAH) pursuant to COMAR 10.01.04 by writing within ninety (90) days of receipt of this letter to:

Maryland Department of Health
Attn: Appeals
201 W. Preston Street, 1st Floor
Baltimore, MD 21201

Please call the REM Intake Unit's staff at 1-800-565-8190 if you have any questions regarding this decision.

Sincerely,

cc: MCO

Figure 280-Final No Contact No Consent Letter

19.7.7 Approval

Purpose: This letter notifies the Client that their application for REM services has been approved. The letter cites the effective date and informs the Client that a case manager will be contacting them to make an appointment.

Precondition: This letter can only be generated if there is an approved and active REM Intake Form.

Approval Letter Form

Rare and Expensive Case Management
Approval Notice

Date Created: February 10, 2020
MA #:
REM Enroll Date: February 10, 2020

Rob REMTest
Client

Dear Rob REMTest:

You have been approved for enrollment in enrollment in Maryland's Rare and Expensive Case Management (REM) program effective February 10, 2020. REM is a program designed to meet the special health care needs of HealthChoice eligible individuals having specific medical conditions.

REM is a case management program. REM participants receive their health care via a traditional fee-for-service system. In addition, the REM program includes access to some special services to meet the needs of its participants. You will be assigned a case manager who will help you plan for your care needs and, when necessary, help you to access services. Your case manager will be contacting you in the near future to make an appointment to meet with you.

The REM program's staff look forward to working with you. If you have any questions now or in the future, please call us at 1-800-565-8190. Welcome to the REM program!

Sincerely,
[Signature Dropdown]

cc: MCO
cc: Agency:

Figure 281-REM Approval Letter

19.7.8 Request for Additional Medical Information

Purpose: This letter is typically sent to medical providers requesting supplemental information needed for the REM Intake Unit to make an eligibility determination for enrollment in the REM Program.

Precondition: This letter can only be generated if a REM Intake Form with an open status (i.e. Pending Nurse Review 1, Pending Nurse Review 2 or Pending Final Decision) is submitted.

REM Additional Medical Information Request Letter Form

**Rare and Expensive Case Management
Additional Medical Information Request**

To: To... 1

From: **Maryland Department of Health REM Intake Unit**

Re: REM Applicant's Name: billy paul MA #:
 DOB: 06/11/2019 Date Referral Received: 02/11/2020 2

February 11, 2020

The Intake Unit for Maryland's Rare and Expensive Case Management (REM) program received a referral on the above named Maryland Medicaid recipient. To be eligible for participation in the REM program, several regulatory requirements must be met. One of these requirements is that the applicant meets specific REM diagnosis criteria (COMAR 10.09.69.01B and O).

A review of the REM application submitted on billy paul's behalf, however, results in the decision that additional medical information is needed to determine his/her REM eligibility. I am, therefore, requesting you to forward the following information for consideration in the eligibility process:

History and Physical within past year Radiology reports supporting the REM diagnosis
 Lab reports supporting the REM diagnosis A specialist consultation note supporting the REM diagnosis
 Other

Please send the requested information via fax or mail to:

REM Intake Unit
 Maryland Department of Health (MDH)
 201 W. Preston Street, Room 210
 Baltimore, MD 21201
 410-333-5426 - Fax

Please note this information must be received in our office by 3 Failure to submit the requested information will result in the denial of the REM application. The basis of the denial will be the lack of sufficient information to confirm the REM applicant's medical condition meets the REM diagnosis criteria as required in COMAR 10.09.69.01B and O.

If you have any questions regarding this request, please call the REM Intake Unit at 1-800-565-8190.
 We will contact you if additional information is still needed. Thank you for your cooperation.

Requested By,
 remadministrator1 Unicorn
 Tester

Figure 282- REM Additional Medical Information Request Letter

19.7.9 Applicant Denial

Purpose: This letter notifies the Client that their application for REM services has been denied. The letter includes a list of reasons for the application denial; one of these toggles must be selected before the letter can be created.

Applicant Denial Letter Form

Rare and Expensive Case Management
Notice of Denial for Participation in REM

Date Created: February 10, 2020
MA #:

Rob REMTest
Client

Dear Rob REMTest:

Our Office has received an application for your enrollment in Maryland's Rare and Expensive Case Management (REM) program. The REM program is designed to meet the special health care needs of HealthChoice eligible individuals who have specific medical conditions. A review of this application reveals that you are not eligible to participate in the REM program.

To participate in the REM program, several conditions must be met. Specifically, REM participants must be eligible to participate in Maryland's HealthChoice Program and meet specific age and medical conditions listed in COMAR 10.09.69.

Your participation in REM is denied because:

- You do not meet the age limitations established for your qualifying disease (COMAR 10.09.69.17).
- Sufficient documentation of a REM diagnosis has not been received by the REM Intake Unit (COMAR 10.09.69.01).
- You are ineligible to participate in HealthChoice because you are eligible to receive Medicare benefits (COMAR 10.09.63.01A) (1)(c).
- You are ineligible to participate in HealthChoice because you are Medicaid eligible as medically needy under a spend down (COMAR 10.09.63.01A) (1)(d).
- You are ineligible to participate in HealthChoice because your Medicaid Certification is for a period of less than six (6) months (COMAR 10.09.63.01A) (1)(e).
- You are ineligible to participate in HealthChoice because you have been, or are expected to be, continuously institutionalized for more than ninety (90) consecutive days (COMAR 10.09.63.01B) (1)(a).
- You are ineligible to participate in HealthChoice because you do not qualify for receipt of Medicaid as categorically needy or medically needy under COMAR 10.09.24(COMAR 10.09.63.01A) (1).
- You have not been determined qualified for receipt of traditional Medicaid, MCHIP or a waiver program by your local DSS office or through the Maryland Health Connection.
- You are incarcerated as an inmate of a public institution (COMAR 10.09.24.05-5A) (1).

If you have any questions regarding this denial please call the REM Intake Unit's staff at 1-800-565-8190.

Sincerely,
[Dropdown Menu]

Figure 283- REM Denial Letter

19.7.10 Decline – Remain in MCO

Purpose: This selection produces two documents:

Memorandum Form

Notifies the managed care organization (MCO) special needs coordinator that the Client has chosen to decline participation in the REM program and has elected to remain with their MCO for medical services.

MEMORANDUM Form

To: 1
 Aetna Better Health

From: 2

Date Created: February 10, 2020

Re: REM Decline – Remain in MCO
 Rob REMTest
 MA #: N/A

The above referenced recipient is eligible for enrollment in the Rare and Expensive Case Management (REM) Program. However, this recipient has requested to remain with your MCO. As specified in COMAR 10.09.69.03.A3, State regulations allow an individual eligible for REM to remain in the MCO of his/her choice.

Based on conversations with your MCO, it is our understanding that there are no medical reasons that would prevent you from meeting the needs of this individual. Therefore, the recipient will be allowed to remain with your MCO.

If you have any questions regarding this matter, please contact the REM Intake Unit at 1-800-565-8190.

cc: HCEU (HealthChoice Eligibility Unit)

Figure 284- REM Decline Memorandum Form

Decline – Remain in MCO notice

This document notifies the Client that they are eligible for the REM program but has chosen to decline participation in the REM program, electing to remain with their MCO.

Rare and Expensive Case Management
Decline - Remain in MCO Notice

Date Created: February 10, 2020
 MA #:

Rob REMTest
 1

Dear Rob REMTest:

The Maryland Department of Health (MDH) has determined that you are eligible for the Rare and Expensive Case Management (REM) Program. State regulations allow an individual eligible for REM to remain in the Managed Care Organization (MCO) of his/her choice, pursuant to COMAR 10.09.69.03.A3. The Maryland Department of Health (MDH) has been notified that you have elected to remain with the MCO – Aetna Better Health.

State regulation also requires that the MDH determine if the MCO of your choice can appropriately meet your medical needs. My staff has contacted Aetna Better Health and it has been determined that they are capable of meeting your medical needs. Aetna Better Health will, therefore, continue to provide your healthcare services.

If you should have any questions regarding this matter, please contact the REM Intake Unit at 1-800-565-8190. 3

Sincerely,
 2

cc: MCO: Aetna Better Health
 MCO Special Needs Coordinator: 1

Figure 285- Remain in MCO Notice Letter

Preconditions: These letters can only be generated if an approved and active REM Intake Form has been submitted.

19.7.11 Reconsideration Approval

Purpose: This letter notifies the Client that, after an initial denial, their referral to the REM program has been reconsidered and approved.

Preconditions: This letter can only be generated if there is an approved and active reconsideration-type REM Intake form along with an approved and active overall decision form.

Reconsideration Approval Letter Form

Rare and Expensive Case Management
Reconsideration Approval Notice

Date Created: February 11, 2020
MA #:
REM Enroll Date: February 11, 2020

billy paul
Client

Dear billy paul:

As you requested on February 11, 2020, the Medical Intake and Authorization Unit of the REM program reassessed your qualifications for enrollment in the REM program using the additional information submitted with your request. As a result of this reassessment, we have determined that the information supports your enrollment in the REM program.

REM is a case management program. REM participants receive their health care via a traditional fee-for-service system. In addition, the REM program includes access to some special services to meet the needs of its participants. You will be assigned a case manager who will help you plan for your care needs and, when necessary, help you to access services. Your case manager will be contacting you in the near future to make an appointment to meet with you.

The REM program's staff look forward to working with you. If you have any questions now or in the future, please call us at 1-800-565-8190. Welcome to the REM program!

Sincerely,

cc: MCO

Figure 286- REM Reconsider Approval Notice

19.7.12 Reconsideration Denial

Purpose: This letter notifies the Client that, after an initial denial, their application has been reassessed and the reconsideration denied.

Preconditions: This letter can only be generated if there is a denied REM Intake form.

Reconsideration Denial Letter Form

Rare and Expensive Case Management
Notice of Denial after Reconsideration

Date Created: February 11, 2020
MA #:

WILLIAM TRANMER
Client
NURSING FACILITY ADM
2131 DAVIDSONVILLE RD
CROFTON, MD 21114

Dear WILLIAM TRANMER:

As you requested on [redacted] the Medical Intake and Authorized Unit of the REM program reassessed your referral to the REM program using the additional information you or someone on your behalf submitted with your Request for Reconsideration. As a result of this reassessment, we have determined that you do not meet the qualifications of the REM program. The reason that you do not qualify is explained below:

Your participation in REM is denied because:

- Our records indicate that you are no longer eligible for Medical Assistance.
- Your presenting diagnosis is not REM eligible (COMAR 10.09.69.01B).
- You do not meet the age limitations established for your qualifying disease (COMAR 10.09.69.17).
- Sufficient documentation of a REM diagnosis has not been received by the REM Intake Unit (COMAR 10.09.69.01).
- You are ineligible to participate in HealthChoice because you are eligible to receive Medicare benefits (COMAR 10.09.63.01A) (1)(c).
- You are ineligible to participate in HealthChoice because you are Medicaid eligible as medically needy under a spend down (COMAR 10.09.63.01A) (1)(d).
- You are ineligible to participate in HealthChoice because your Medicaid Certification is for a period of less than six (6) months (COMAR 10.09.63.01A) (1)(e).
- You are ineligible to participate in HealthChoice because you have been, or are expected to be, continuously institutionalized for more than ninety (90) consecutive days (COMAR 10.09.63.01B) (1)(a).
- You are ineligible to participate in HealthChoice because you do not qualify for receipt of Medicaid as categorically needy or medically needy under COMAR 10.09.24(COMAR 10.09.63.01A) (1).
- You have not been determined qualified for receipt of traditional Medicaid, MCHIP or a waiver program by your local DSS office or through the Maryland Health Connection.
- You are incarcerated as an inmate of a public institution (COMAR 10.09.24.05-5A) (1).

If you have any questions regarding this denial please call the REM Intake Unit's staff at 1-800-565-8190.

Sincerely, [redacted]

Figure 287-REM Reconsideration Denial Letter

19.7.13 Notice of REM Disenrollment Due to Age Out

Purpose: This letter notifies the Client that they are being disenrolled from the REM program because they no longer meet the age requirements for REM enrollment based on the diagnosis that previously allowed them to qualify.

Notice of REM Disenrollment Due to Age Out Form

Rare and Expensive Case Management
 Notice of REM Disenrollment Due to Age Out

Date Created: February 12, 2020
 MA #:

Robtester Test101

Client 1

Dear Robtester Test101:

Your participation in the REM program has been based on the diagnosis of Q7959. REM eligibility based on this diagnosis is limited to the age of 1 pursuant to COMAR 10.09.69.17. As you will exceed this age on February 24, 2020, your REM participation will end as of that date.

You may be eligible for continued participation in the REM program if you have another qualifying diagnosis. Your REM case manager may help you to submit additional medical documentation to the REM Intake Unit for consideration to see if you qualify for continued participation in REM under another qualifying disease. Should this be your wish, please contact your REM case manager and request assistance. It is important that the additional documentation be submitted to the REM Intake Unit for its review and consideration as soon as possible. Based on their review of the additional submitted documents, the REM Intake Unit's staff will determine if you qualify for continued REM participation based on another diagnosis listed COMAR 10.09.69.

Failure to qualify for REM participation based upon another diagnosis means that you will be discharged from the REM program effective February 24, 2020. This means that a Managed Care Organization (MCO) will be responsible for your medical care. Your REM case manager can assist you to select a MCO that can meet your needs. I urge you to work with your REM case manager to ensure your transition from the REM program is as smooth as possible.

If you disagree with this determination, you may request a fair hearing to the Maryland Office of Administrative Hearings pursuant to COMAR 10.01.04 by writing within ninety (90) days of receipt of this letter to:

Maryland Department of Health
 201 W. Preston Street, Room 127, code 0413
 Baltimore, MD 21201

You must request the fair hearing within ten (10) days of receipt of this letter if you want to continue your participation in the REM program until a hearing decision is rendered.

If you have any questions regarding this matter, please contact the REM Intake Unit at 1-800-565-8190.

Sincerely,

2

cc: THE COORDINATING CENTER

Figure 288-REM Disenrollment Due to Age Out Letter

19.7.14 Notice of Disenrollment for Participation in REM

Purpose: This letter notifies the Client that he or she has been disenrolled from participation in REM. This form is used for all disenrollment reasons **except** the following:

- Participant deceased
- Participant aged out of REM
- Participant requests placement in an MCO
- Participant aged out of REM and new REM diagnosis approved

Preconditions: This letter can only be generated if there is a disenrolled and active Overall Decision form.

Notice of Disenrollment from Participation in REM Form

Rare and Expensive Case Management
Notice of Disenrollment from Participation in REM

Regression_Jay1 Test

Client

Dear Regression_Jay1 Test:

The purpose of this letter is to advise you that you no longer qualify to participate in the Rare and Expensive Case Management (REM) program. The REM program is designed to meet the special health care needs of HealthChoice eligible individuals who have specific medical conditions. To participate in the REM program, several conditions must be met. Specifically, REM participants must be eligible to participate in Maryland's HealthChoice Program and meet specific age and medical conditions listed in COMAR 10.09.69.

You are no longer qualified to participate in the Rare and Expensive Case Management (REM) program because:

- Our records indicate that you are no longer eligible for Medical Assistance.
- You are ineligible to participate in HealthChoice because you have been, or are expected to be, continuously institutionalized for more than ninety (90) consecutive days (COMAR 10.09.63.01B. (1)(a)).
- You are incarcerated as an inmate of a public institution (COMAR 10.09.24.05-5A (1)).
- You have moved out of the state of Maryland.
- You are ineligible to participate in HealthChoice because you are eligible to receive Medicare benefits (COMAR 10.09.63.01A (1)(c)).
- You did not respond to your assigned REM Case manager.
- You are ineligible to participate in HealthChoice.
- You no longer have the REM Qualifying Diagnosis.
- Other:

Date Created: February 11, 2020

MA #:

You must request the fair hearing within ten (10) days of receipt of this letter if you want to continue your participation in the REM program until a hearing decision is rendered.

You must request the fair hearing within ten (10) days of receipt of this letter if you want to continue your participation in the REM program until a hearing decision is rendered.

If you have any questions regarding this matter, please contact the REM Intake Unit at 1-800-565-8190.

Sincerely,

Figure 289-Notice to Disenrollment from Participation in REM Letter

19.7.15 Notice of REM Disenrollment – Return to MCO

Purpose: This selection produces two letters notifying that the Client has been disenrolled from REM services and will return to his or her MCO: (1) a memorandum to the MCO and (2) a notice to the Client.

Memo for Notice of REM Disenrollment – Return to an MCO

Memo for Notice of REM Disenrollment - Return to an MCO

To: 1
Aetna Better Health

From: 2

Date Created: February 11, 2020

Re: Notice of REM Disenrollment - Return to an MCO
billy paul
MA #:

The above referenced recipient has been enrolled in the Rare and Expensive Case Management (REM) Program. This recipient has requested to return to your MCO. As specified in COMAR 10.09.69.04.E, "A REM participant may elect to disenroll from REM and enroll in an MCO by notifying the Department of that decision."

Based on conversations with your MCO, it is our understanding that there are no medical reasons that would prevent you from meeting the needs of this individual. Therefore, the recipient will be allowed to remain with your MCO.

If you have any questions regarding this matter, please contact the REM Intake Unit at 1-800-565-8190.

cc: HCEU (HealthChoice Eligibility Unit)

Figure 290-REM Memorandum of REM Disenrollment – Return to MCO Letter

Notice for Notice of REM Disenrollment – Return to an MCO

Notice of Disenrollment - Return to an MCO

Rare and Expensive Case Management
Notice of REM Disenrollment - Return to an MCO

Date Created: February 11, 2020
MA #:

billy paul
 1

Dear billy paul:

The Maryland Department of Health (MDH) has determined that you are eligible for the Rare and Expensive Case Management (REM) Program. State regulations allow a REM recipient to elect to disenroll from REM and enroll in a Managed Care Organization (MCO), pursuant to COMAR 10.09.69.04.E. The Maryland Department of Health (MDH) has been notified that you have elected to return to the MCO – Aetna Better Health.

State regulation also requires that the MDH determine if the MCO of your choice can appropriately meet your medical needs. My staff has contacted Aetna Better Health and it has been determined that they are capable of meeting your medical needs. Aetna Better Health will, therefore, continue to provide your healthcare services.

If you should have any questions regarding this matter, please contact the REM Intake Unit at 1-800-565-8190.

Sincerely, 2

cc: MCO: Aetna Better Health
MCO Special Needs Coordinator: 3

Figure 291-Notice of REM Disenrollment – Return to MCO Letter

20 Reportable Events

The term Reportable Event is used interchangeably with Significant Event. A Reportable Event is an adverse event or incident that poses or potentially poses a risk to a Client. A Reportable Event should be reported to the CMA REM Supervisor and documented in the LTSSMaryland system. The Reportable Event should be initiated by CMA REM Case Manager. This should be documented as soon as the CMA REM Case Manager becomes aware of it, then reviewed and approved by a CMA REM Supervisor before it is submitted to the Maryland Department of Health (MDH). LTSSMaryland has an existing Reportable Event module which is used for various LTSSMaryland programs. Modifications have been made to include required fields for the REM program. A Reportable Event case will be closed by MDH within 45 days of submission.

20.1 Primary Actors

1. The following user roles can **Add or Edit** a Reportable Event:

Department	Roles
MDH	MDH REM Administrator, MDH REM Intake Nurse
CMA	CMA REM Administrator, CMA REM Case Manager, CMA REM Supervisor

Table 38-Add/Edit Reportable Events - Primary Actors

2. The following user roles can **List or View** a Reportable Event:

Department	Roles
MDH	MDH REM Administrator, MDH REM Intake Nurse, MDH REM Intake Specialist, MDH REM Physician Advisor
CMA	CMA REM Administrator, CMA REM Supervisor, CMA REM Case Manager, CMA REM Intake Specialist, CMA REM Provider Relations Rep

Table 39-List/View Reportable Events - Primary Actors

20.2 Reportable Event Workflow

Once a Reportable Event is created, it will be in “In Progress” status. Upon submission to MDH, the Reportable Event will transition to “MDH Review” status. If discarded, the Reportable Event will transition to “Discarded” status.

NOTE: MDH will close a Reportable Event case within 45 days after submission.

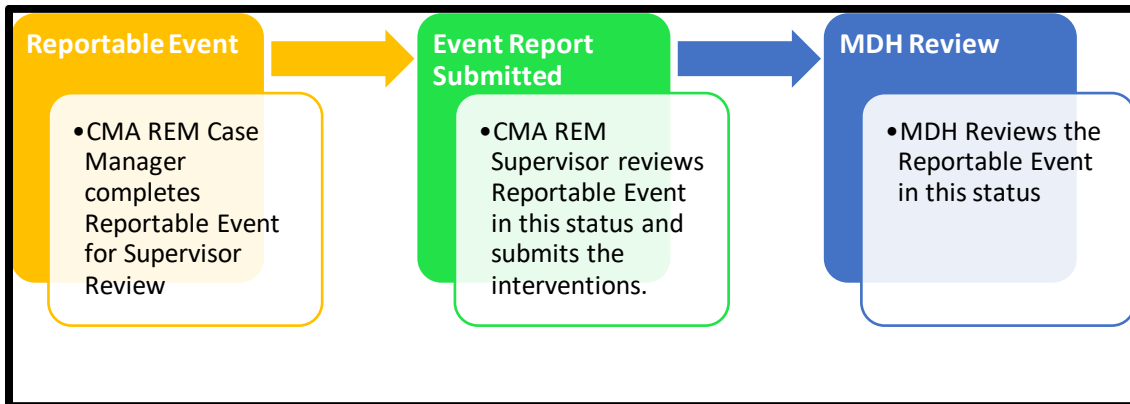


Figure 292- Reportable Event Workflow

20.3 Add Reportable Event

Authorized users can add a Reportable Event by completing the following steps:

1. Select **Clients** tab, enter Client search criteria and click **Cases**.
2. From the search results list, select **Client Summary** hyperlink.
3. From the Client Profile, select the **Case Management** banner on the left navigation pane.
4. Select **Reportable Events**.
5. Click **Add** hyperlink.

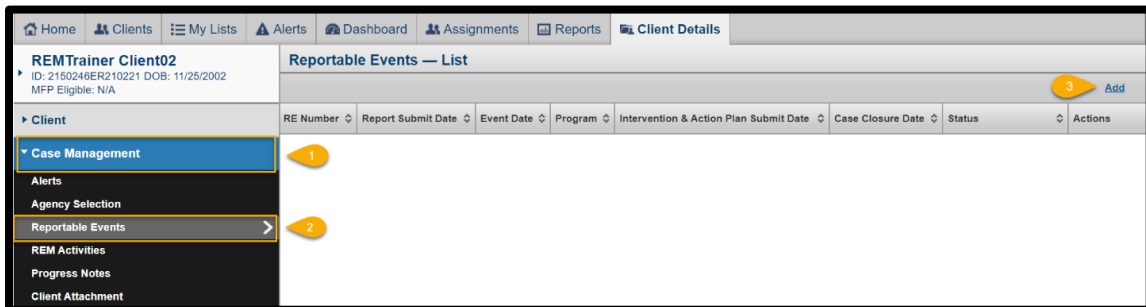


Figure 293-Reportable Events – Add

- Upon selecting the hyperlink, the Reportable Event – Summary Information will display. Under Program Type, select **REM** and click **Save**.

The screenshot shows a web application interface for a 'Reportable Event – Summary Information' form. The form is for a client named 'REMTrainer Client02'. The 'Program Type' dropdown menu is highlighted with a yellow box, and the 'REM' option is selected. The form includes fields for Client Information (RE Number, MA#, Jurisdiction, Client Name, Gender), Address (Address, Address Type, Address Description), and other details like Supports Planner, Support Planning Agency, and REM Case Manager. Buttons for 'Cancel' and 'Save' are visible at the top right of the form.

Figure 294-Reportable Events – Summary Information

NOTE: ** indicates a field required to **Submit** the form.
 * indicates a field required to **Save** the form.

- The Reportable Event – Summary page will be displayed, and the Success Message will appear indicating the record has been saved.
- The Summary Information section has been completed based on the user’s selection of the Program Type “REM” in Step #6. The user must complete **Sections I. Event Report** and **Attachments** in order to submit the Reportable Event.

The screenshot shows the 'Reportable Event – Summary' page. The page has a status of 'In Progress - MDH Review Due Date:'. The navigation menu includes 'Summary Information **', 'I. Event Report **', 'II. Urgent Request', and 'Attachments'. A success message 'Success: Record has been saved.' is displayed in a green box at the bottom right of the page.

Figure 295-Reportable Event – Summary

- Click on **Section I. Event Report** banner to expand the section.

- Click **Start** to complete each subsection under **Section I. Event Report**.

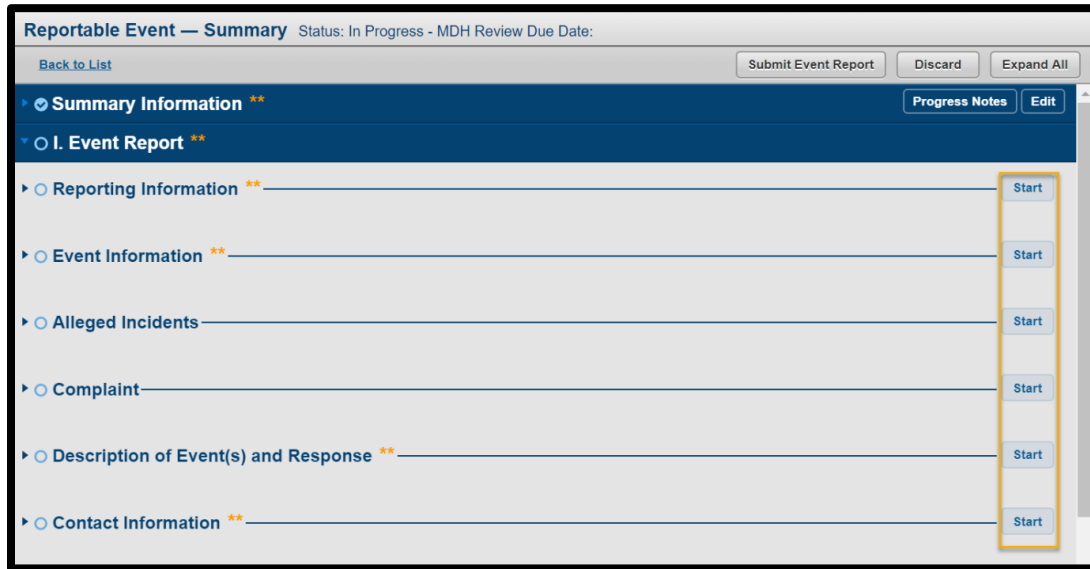


Figure 296-Reportable Event – Event Report Section

- In the **Reporting Information** subsection complete the remaining required areas and click **Save**.

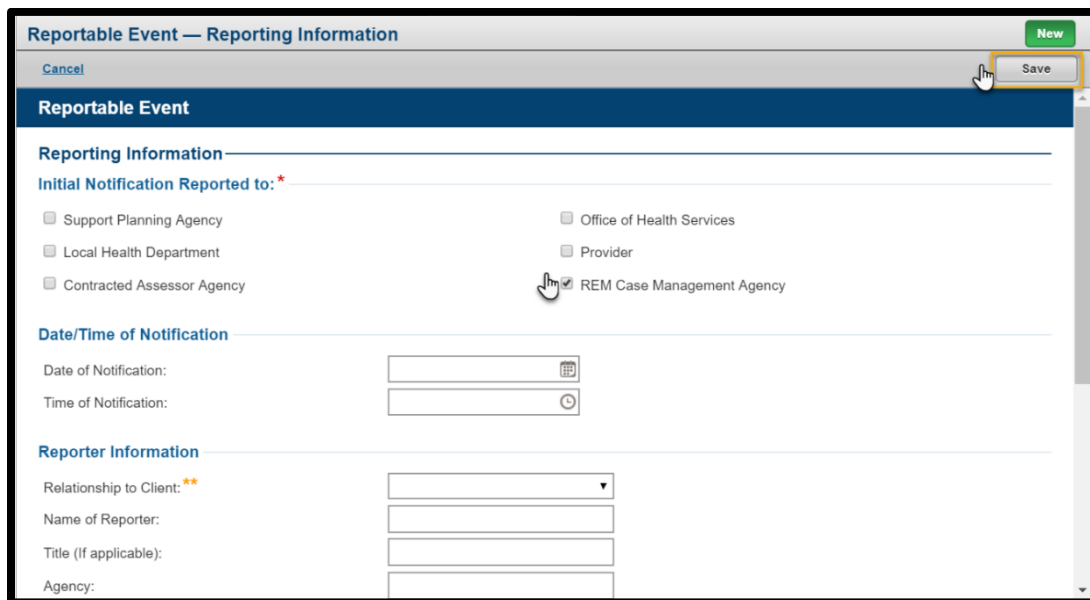


Figure 297-Reportable Event – Reporting Event Subsection

- In the **Event Information** subsection, the user must complete the required areas.
- The user has the option to click on the **+Add New Provider** or **+Add Existing Provider** buttons displayed in green to complete these areas if applicable. All required fields must be entered to **Save** this information.

- Once the entire **Event Information** subsection has been completed, click **Save**.

Figure 298-Reportable Event –Event Information Subsection

- Based on the information entered in the **Event Information** subsection, the subsections for **Alleged Incidents** and **Complaint** may become required in order to submit the Reportable Event. **NOTE - **** are required to submit.

Figure 299-Reportable Event –Event Report Section

16. In the **Alleged Incidents** subsection, the user must complete the fields and click **Save**.
NOTE – this subsection may or may not be required to submit based on information entered by the user in Event Information.

Figure 300-Reportable Events – Alleged Incidents Subsection

17. In the **Complaint** subsection, the user must complete the fields and click **Save**.
NOTE – this subsection may or may not be required to submit based on information entered by the user in Event Information.

Figure 301-Reportable Events – Complaint Subsection

- In the **Description of Event(s) and Response** subsection, the user must complete the fields and click **Save**.

Figure 302-Reportable Events – Description and Event(s) and Response Subsection

- In the **Contact Information** subsection, the user must add at least one contact. Click on the **+Add Contact** green button to add a contact. Complete the required fields and click **Save**.

Figure 303-Reportable Events – Contact Information Subsection

20. Once sections **Summary Information** and **Section I. Event Report** are completed, the blue circle will appear filled with a checkmark indicating the areas are completed.

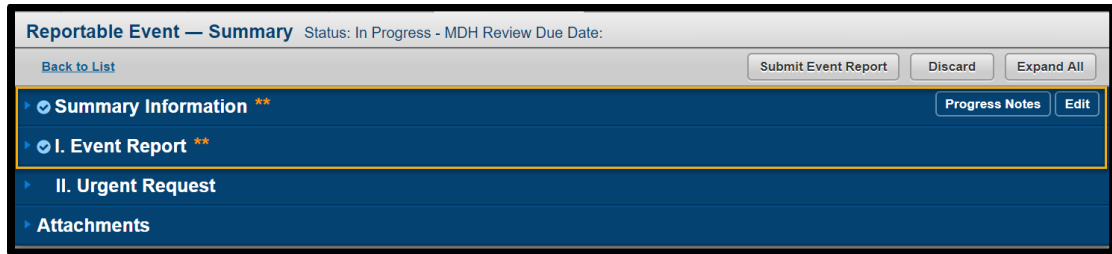


Figure 304-Reportable Event –Summary

21. Click on the **Attachments** banner to expand the section.
22. User must click **“Yes”** or **“No”** to complete the Attachments section. The user will be prompted to upload and attach a document if **“Yes”** is selected.
23. Follow the prompts to upload the document and click **Save**.

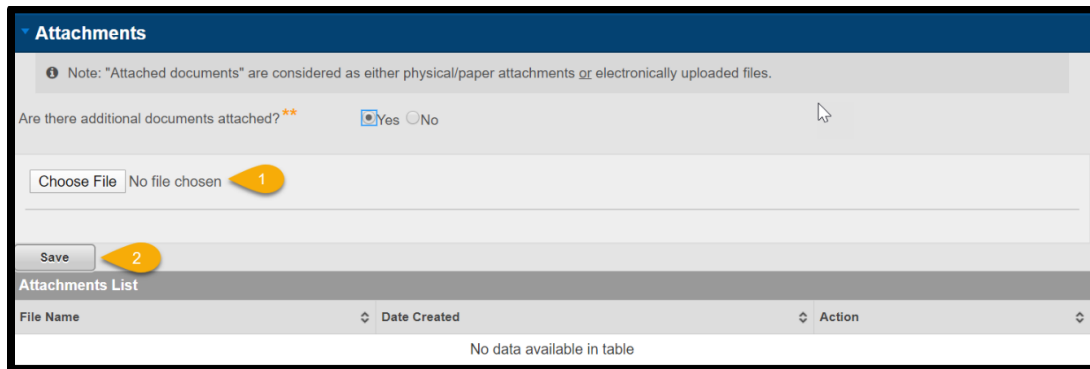


Figure 305-Reportable Event – Attachments Section

24. The CMA REM Supervisor must review the Reportable Event **prior** to submitting it to MDH.
 - Once the Reportable Event has been reviewed by the CMA REM Supervisor, click **Submit Event Report**.

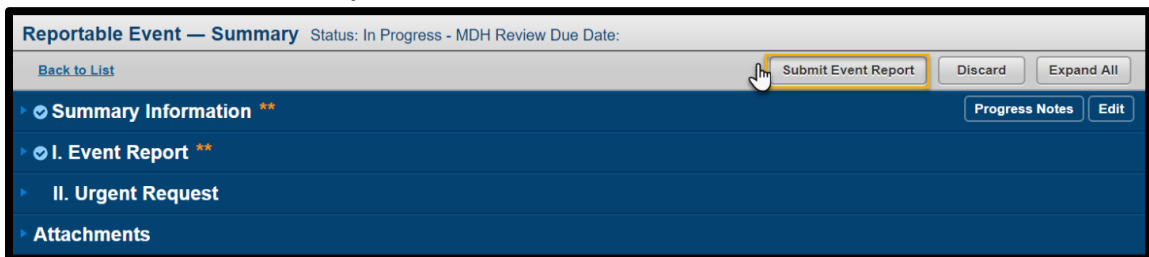


Figure 306-Reportable Event –Summary - Submit

25. Upon submission, a Success Message will indicate the record has been submitted. The status will reflect Event Report Submitted and the MDH Review Due Date.

26. The CMA REM Case Manager must complete Section II. Intervention and Action Plan(s). Click **Start** on the Section II. Intervention and Action Plan(s) banner. **NOTE** – The user does not need to complete Section III. MDH Triage.

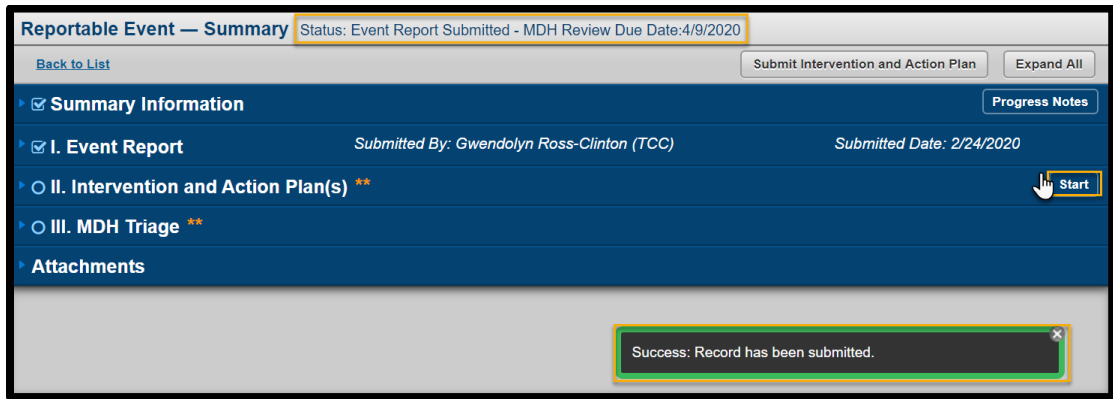


Figure 307-Reportable Event –Summary – Section II

27. In Section II. Intervention and Action Plan(s), CMA REM Case Manager should complete the required areas and click **Save**.

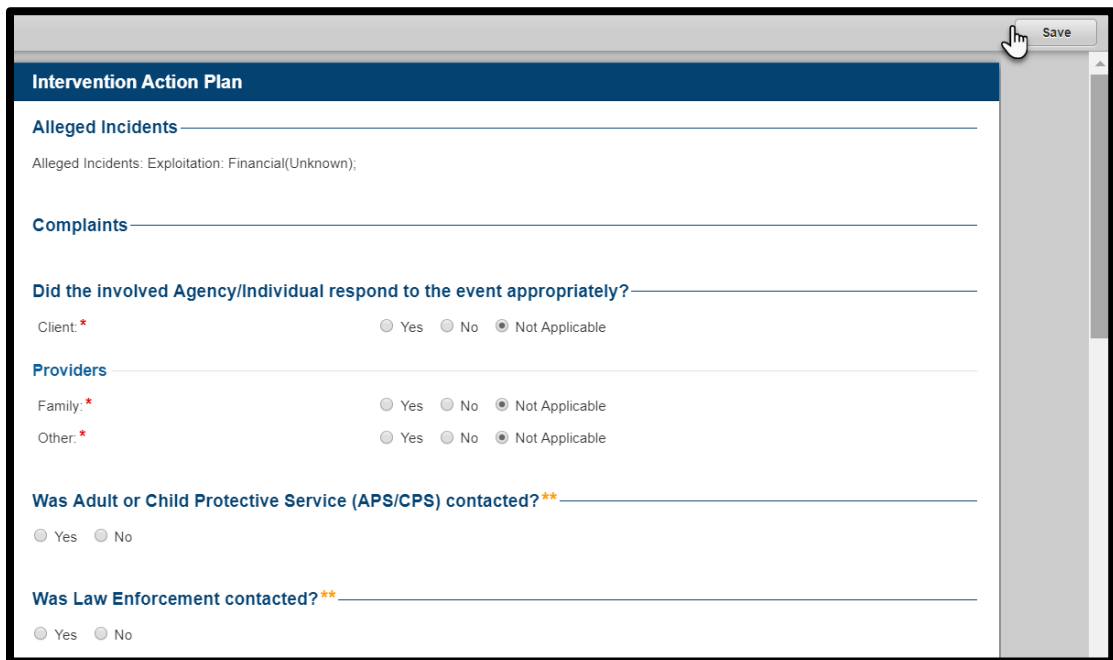


Figure 308-Reportable Event –Intervention Action Plan

Was the client informed of their right to appeal or adverse action? **

Yes No

Was onsite visit conducted? **

Yes No

Additional Information

Findings: **

Interventions: **

Follow-up: **

Is there a Corrective Action Plan? **

Yes No

Figure 309-Reportable Event –Intervention Action Plan – (Form Continued)

28. Once the Intervention and Action Plan is saved by CMA REM Case Manager then they should notify their supervisor to review the Reportable Event.
29. Once the Reportable Event has been reviewed by the CMA REM Supervisor, click **Submit Intervention and Action Plan**.
 - Section II. Intervention and Action Plan(s) will have a blue circle filled with a checkmark indicating the area is completed.

Reportable Event — Summary Status: Event Report Submitted - MDH Review Due Date:4/9/2020

[Back to List](#) [Discard Intervention and Action Plan](#) [Submit Intervention and Action Plan](#) [Expand All](#) [Progress Notes](#)

Summary Information

I. Event Report Submitted By: Gwendolyn Ross-Clinton (TCC) Submitted Date: 2/24/2020

II. Intervention and Action Plan(s) ** [Edit](#)

III. MDH Triage **

Attachments

Success: Record has been saved.

Figure 310-Reportable Event –Intervention Action Plan - Saved

30. Upon submission, the status of the Reportable Event will change to “Pending MDH Review” and an alert will be sent to MDH REM Admin that the Reportable Event is ready for their review.
31. Once the “Reportable Event” and “Intervention and Action Plan” have been submitted to MDH, the CMA users no longer can edit either form.
32. All the users can add Progress **NOTES** to provide updates to the Reportable Event Report if the case has not been closed by MDH.

33. To add a Progress **NOTE**, click the **Progress NOTES** button.

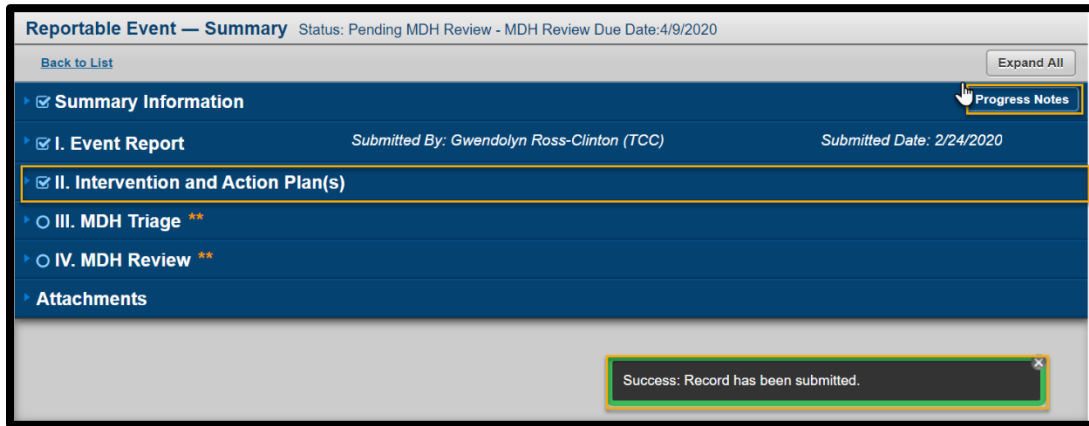


Figure 311-Reportable Event –Intervention Action Plan - Submitted

34. Enter the **NOTE** in the **NOTE** field and click **Add Progress NOTE**. MDH will be able to view the Progress **NOTE** once it has been entered.

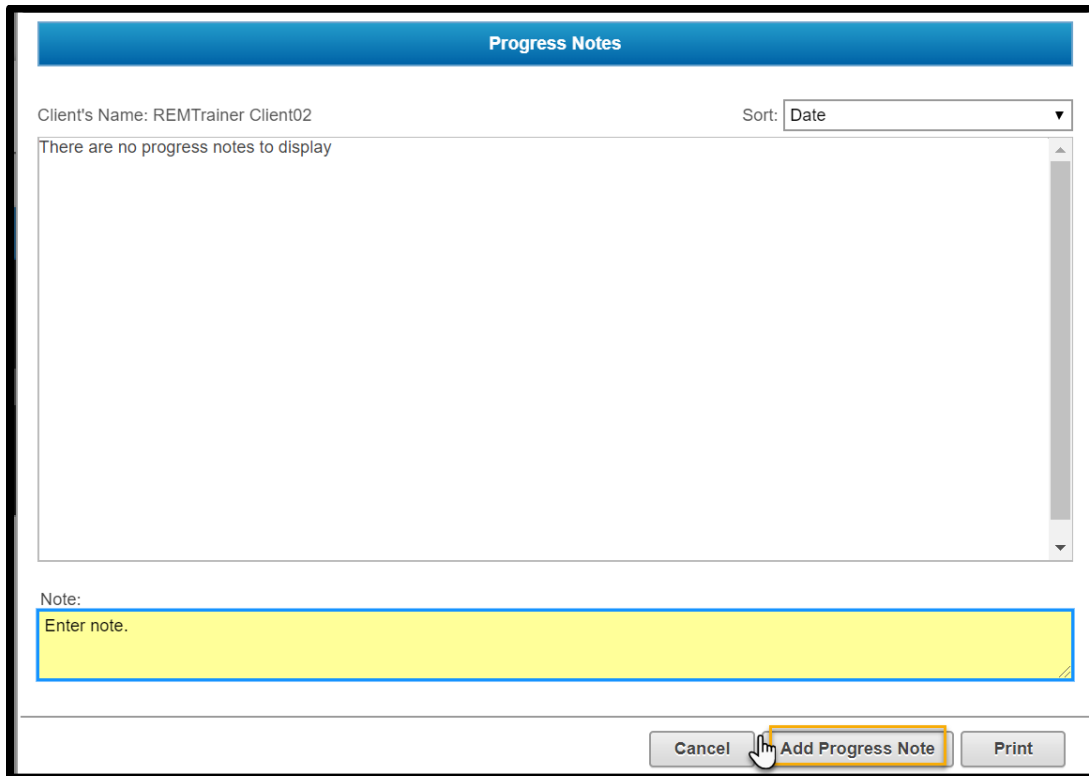


Figure 312-Reportable Event –Progress **NOTES** - Add

20.4 View Reportable Event List Page

Users can view existing Reportable Events by following steps:

1. Select **Clients** tab, enter Client search criteria and click **Cases**.
2. From the search results list, select **Client Summary** hyperlink.
3. From the Client Profile, select the **Case Management** banner on the left navigation pane.

4. Select **Reportable Events**. System displays the list of Reportable Events.
5. The user can **View** or **Print** the Reportable Event by selecting the corresponding hyperlink.

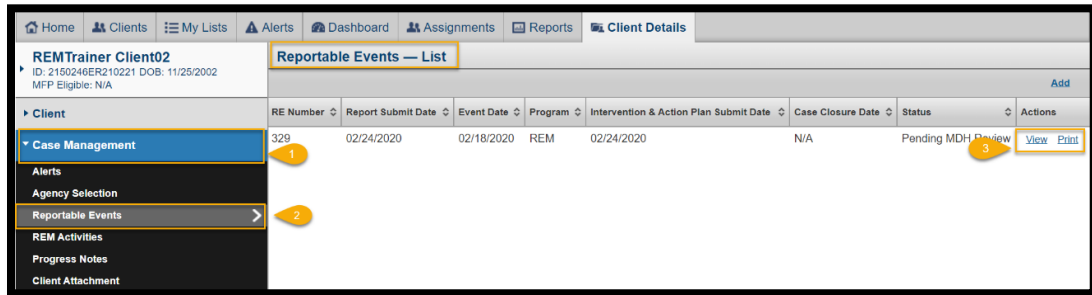


Figure 313-Reportable Event –List

21 Reportable Events (RE) - Reports

Reportable Events Reports allow users to search these incidents according to various parameters.

The system offers four types of Reportable Events Reports:

- Reportable Events – Detailed Report
- Reportable Events – Provider Report
- Reportable Events – Timeline Report
- Reportable Events – Summary Report

NOTE: MDH Triage option in these reports is not for REM Use.

21.1 Primary Actors

The Primary Actors for reportable events reports are as follows:

DEPARTMENT	ROLES
CMA	CMA REM Administrator, CMA REM Supervisor, CMA REM Intake Specialist, CMA REM Provider Relations Rep (For Clients assigned to the agency), CMA REM Case Manager (For their assigned Clients)
MDH	MDH REM Administrator, MDH REM Intake Nurse, MDH REM Intake Specialist

Table 40-Reportable Events (RE) – Reports – Primary Actors

21.2 View Reportable Events – Detailed Report

Generates a report of all incidents matching the user-selected parameters, organized by jurisdiction and Client name.

1. Select the **Reports** tab.
2. Choose the **Reportable Events** in category.

3. Click **Filter** to see the list of Reportable Events Reports.
4. To view the **RE – Detailed Report**, click the **View** hyperlink.

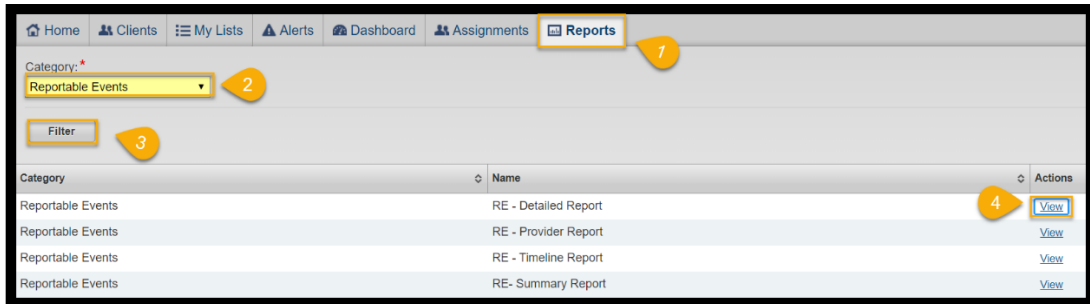


Figure 314-Reportable Events – Detailed Report - View

5. Select the input parameters for the search criteria in the following fields:
 - Provider #: The provider identification number (**NOTE:** this is a manual entry field)
 - Start Date (mm/dd/yyyy): Beginning date for the search criteria
 - Jurisdiction: County/jurisdiction
 - Event Type: Incident, complaint, or both toggles (This field is mandatory.)
 - Triage: (**NOTE: Not for REM use**)
 - Program Type: REM, CO, or all programs
 - End Date (mm/dd/yyyy): Final date of the search criteria
 - Case Status
 - Closed
 - MDH Triaged (**NOTE: Not for REM use**)
 - Event Report Submitted
 - In Progress
 - Intervention Action Plan Submitted
 - Pending MDH Review
 - Incident Type
 - Abuse
 - Abandonment
 - Elopement/missing Person
 - Rights Violation
 - Seclusion/restraint
 - Medication/treatment errors
 - Failure to follow the plan of service
 - Other incident type
 - Neglect
 - Accident/injury
 - Emergency Room Visit
 - Hospitalization
 - In-patient Psychiatric Hospitalization
 - Death

- Suicide
- Suicide Attempt
- N/A
- MFP Participant? — Yes or No

Figure 315-Reportable Events Reports - Detailed Report-Search Panel

6. Select the **View Report** button twice.

Figure 316-Reportable Events Reports - Detailed Report-View Report

7. The system generates the RE – Detailed Report. This report summarizes the user-selected search parameters under results.

RE - Detailed Report

Search Criteria:
Provider ID: Select All
Date Type: Report Date
Start Date: 2/24/2020
End Date: 2/24/2020
Case Status: Closed,MDH Triaged, Event Report Submitted,In Progress,Intervention Action Plan Submitted,Pending MDH Review
Jurisdiction: Allegany, Anne Arundel, Baltimore, Baltimore City, Calvert, Caroline, Carroll, Cecil, Charles, Dorchester, Frederick, Garrett, Harford, Howard, Kent, Montgomery, Other, Prince George's, Queen Anne's, Somerset, St. Mary's, Talbot, Washington, Wicomico, Worcester
Event Type: Incident, Complaint, Both
Incident Type: Abuse, Abandonment, Elopement/Missing Person, Exploitation, Rights Violation, Seclusion/Restraint, Medication/Treatment Error, Failure to follow the plan of service, Other Incident Type, Neglect, Accident/Injury, Emergency Room Visit, Hospitalization, In-Patient Psychiatric Hospitalization, Death, Suicide, Suicide Attempt, N/A
Triage: Immediate Jeopardy, Non-immediate Jeopardy - High, Non-immediate Jeopardy - Medium, Non-immediate Jeopardy-Low, Administrative Review/Offsite Investigation, Referral Immediate, Referral Other, No Action Necessary, Other, N/A
MFP Participant?: No, Yes
Program Type: REM
Total Number of records returned: 8

Jurisdiction	Participant Name	RE #	Report Date	Case Status	Event Type	Alleged Incident	Triage	Involved Provider(s)	Assigned Quality Unit Staff	Program Type
Baltimore	Overview1, REM	66	01/17/2020	Closed	Incident	Abuse; Accident/Injury; Exploitation; Medication/Treatment Error; Other Incident Type; Seclusion/Restraint; Suicide Attempt	N/A	N/A		REM

Figure 317-Reportable Events - Detailed Report Results

8. Report generated can be downloaded and saved for future use. To do this, click on the **Save icon** available just below the region where search criteria was entered. A list of formats for saving the report is provided.

9. Select the desired format. A new file with the contents of the report will be generated in that file format which the user can store on the computer.
 - . Use the back arrow key from the top left corner (floppy icon) to navigate back to the Summary Report.

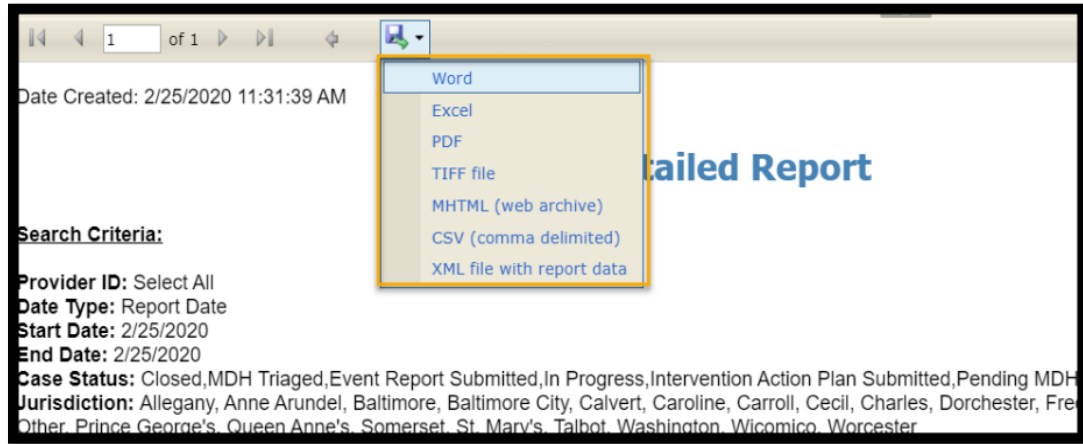


Figure 318- Reportable Events – Detailed Report - Download

21.3 View Reportable Events – Provider Report

Generates a report of all incidents matching the user-selected parameters, organized by jurisdiction and provider #

1. Select the **Reports** tab.
2. Choose the **Reportable Events** in category.
3. Click **Filter** to see the list of Reportable Events Reports.
4. To view the **Reportable Events – Provider Report**, click the **View** hyperlink.

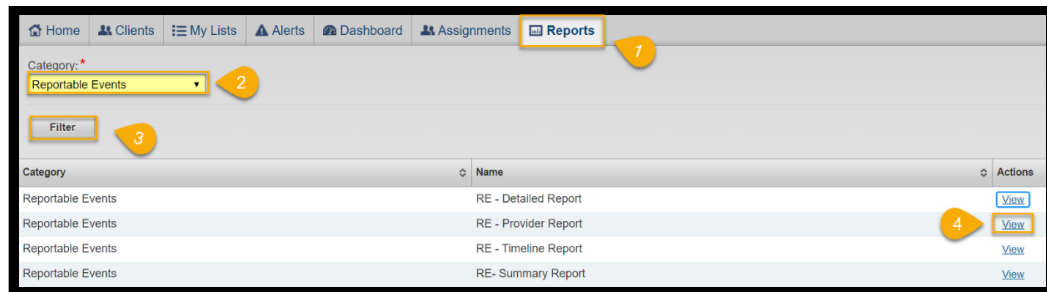


Figure 319-Reportable Events – Provider Report - View

5. Select the input parameters for the search criteria in the following fields:
 - Provider #: The provider identification number (**NOTE:** this is a manual entry field)
 - From Date (mm/dd/yyyy): Beginning date for the search criteria
 - Case Status
 - Closed
 - MDH Triaged
 - Event Report Submitted
 - In Progress

- Intervention Action Plan Submitted
 - Pending MDH Review
- Event Type: Incident, complaint, or both toggles (This field is mandatory)
- Triage (**NOTE: Not for REM Use**)
- Program Type: CO, REM, or all programs
- Date Type: Report Date, Event date, RE without Event Date
- To Date (mm/dd/yyyy): Final date of the search criteria
- Jurisdiction: County/jurisdiction
- Incident Type
 - Abuse
 - Abandonment
 - Elopement/missing Person
 - Rights Violation
 - Seclusion/restraint
 - Medication/treatment errors
 - Failure to follow the plan of service
 - Other incident type
 - Neglect
 - Accident/injury
 - Emergency Room Visit
 - Hospitalization
 - In-patient Psychiatric Hospitalization
 - Death
 - Suicide
 - Suicide Attempt
 - N/A
- MFP Participant? — Yes or No

The screenshot shows a search panel with the following fields and values:

Provider #	Select All	Date Type	Report Date	View Report
From Date	2/25/2020 12:00:00 AM	To Date	2/25/2020 12:00:00 AM	
Case Status	Closed, MDH Triaged, Event Report St	Jurisdiction	Allegany, Anne Arundel, Baltimore, Bc	
Event Type		Incident Type	Abuse, Abandonment, Elopement/Mis	
Triage	Immediate Jeopardy, Non-immediate	MFP Participant?	No, Yes	
ProgramType	REM			

Figure 320- Reportable Events Report – Provider Report Search Panel

6. Select the **View Report** button twice.

Figure 321- Reportable Events Report – Provider Report Search Panel

7. The system will generate the RE – Provider Report.

Jurisdiction	Provider ID	Provider Name	RE #	Participant	Case Status	Event Type	Alleged Incident	Triage	Assigned Quality	Pr
Baltimore			66	Overview1, REM	Closed	Incident	Abuse/Accident/Injury/Exploitation/Medication/Treatment Error/Other Incident Type:Seclusion/Restraint/Suicide Attempt	N/A		RE

Figure 322- Reportable Events Report – Provider Report Results

8. To save the report for further use, click on the **Save icon** available just below the region where search criteria was entered. A list of formats for saving the report is provided.
9. Select the desired format. A new file with the contents of the report will be generated in that file format which the user can store on the computer.

Figure 323-Reportable Events Report –Provider Report- Download

21.4 View Reportable Events – Timeline Report

Generates a report of all incidents matching the user-selected parameters according to time markers such as Start Date and End Date, action plan assigned, and processing time.

1. Select the **Reports** tab.
2. Choose the **Reportable Events** in category.
3. Click **Filter** to see the list of Reportable Events Reports.
4. To view the **Reportable Events – Timeline Report**, click the **View** hyperlink.

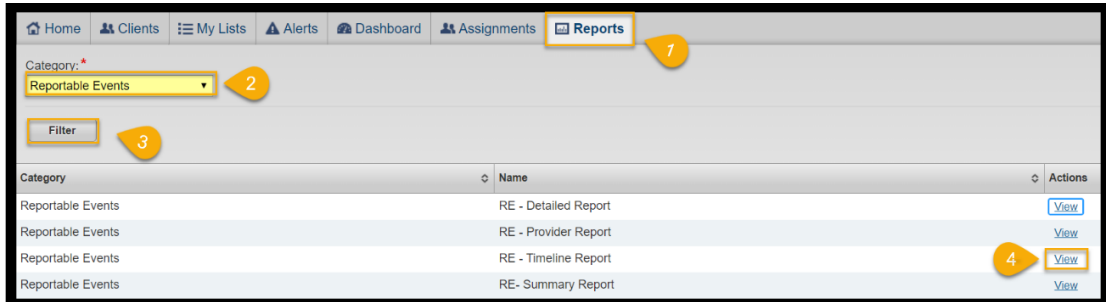


Figure 324-Reportable Events Reports - Timeline Report- View

5. Select the input parameters for the search criteria in the following fields:
 - Case Status: Closed, MDH Triaged, Event Report Submitted, In Progress, Intervention Action Plan Submitted, Pending MDH Review
 - Start Date (mm/dd/yyyy): Start date for the search criteria. (**NOTE:** This field will not populate unless a value has been submitted into the Date Type field.)
 - Date Type: Report Date, Event Date, RE without Event Date
 - End Date (mm/dd/yyyy): Ending date for the search criteria. (**NOTE:** This field will not populate unless a value has been submitted into the Date Type field.)
 - MFP Participant? — Yes or No

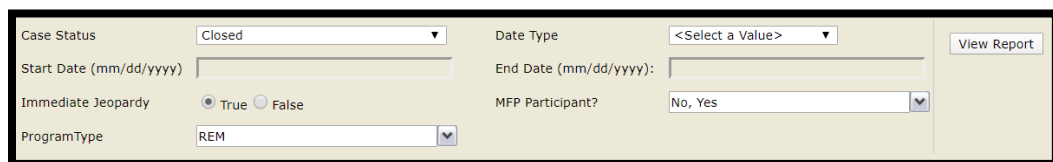


Figure 325- Reportable Events Report - Timeline Report - Search Panel

6. Select the **View Report** button twice.

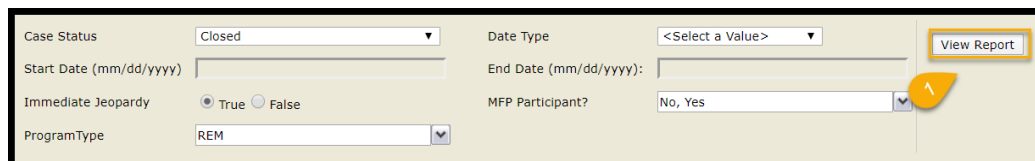


Figure 326- Reportable Events Report - Timeline Report – View Report

- The system will generate the RE – Timeline Report. To drill down into a reportable event, select the appropriate RE number hyperlink; this will direct you to the Reportable Event – Summary.

Date Created: 2/24/2020 12:44:24 PM

RE - Timeline Report

Search Criteria:
 Date Type: Report Date
 Start Date: 2/24/2000
 End Date: 2/24/2020
 Case Status: Pending MDH Review
 Immediate Jeopardy: Yes
 MFP Participant?: No, Yes
 Program Type: REM
 Total Number of records returned: 1

MDH Quality Unit Staff	RE Number	Days to Event Reported	Days to Triage Assigned	Days to Action Plan Submitted	Current Processing Time	Program Type
dhmhqualityunitstaff1 DHHQualityStaff	51			2	2	93 REM
Total RE: 1	Avg.			2.0	2.0	93

Figure 327-Reportable Events Report – Timeline Reports Drilldown

- Report generated can be downloaded and saved for future use. To do this, click on the **Save icon** available just below the region where search criteria was entered. A list of formats for saving the report is provided.
- Select the desired format. A new file with the contents of the report will be generated in that file format which the user can store on the computer.

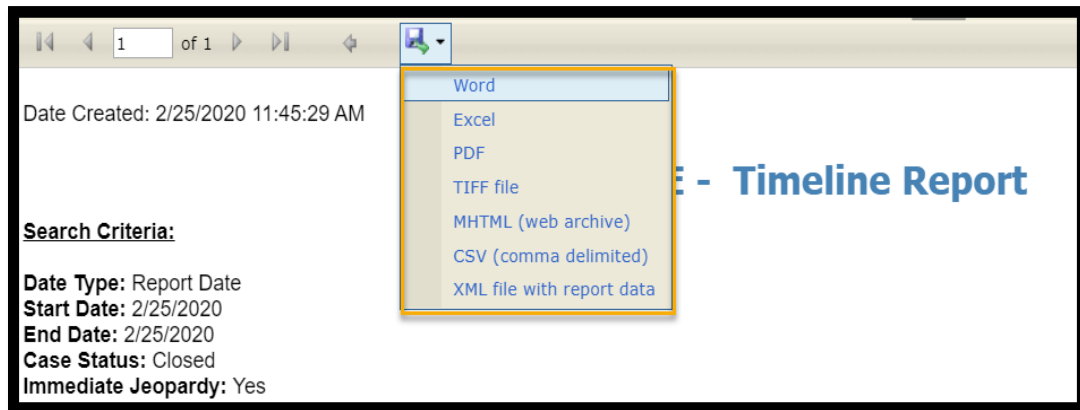


Figure 328-Reportable Events Reports- Timeline Report - Download

21.5 View Reportable Events – Summary Report

Generates a report that summarizes the number of events matching the user-selected parameters according to event type, and whether the event is open or closed

- Select the **Reports** tab.
- Choose the **Reportable Events** in category.
- Click **Filter** to see the list of Reportable Events Reports.

4. To view the **Reportable Events – Summary Report**, click the **View** hyperlink.

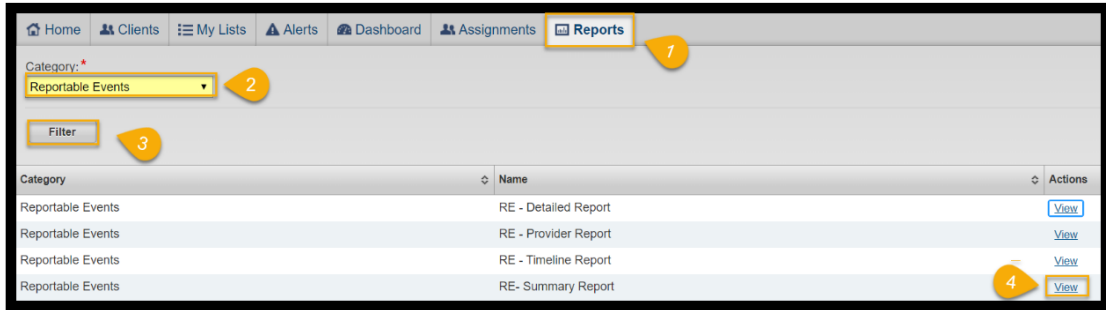


Figure 329- Reportable Events Reports - Summary Report - View

5. Select the input parameters for the search criteria in the following fields:

- Provider #: The provider identification number. (**NOTE:** This is a manual entry field.)
- From Date: Beginning parameter of the search criteria
- Criteria: By event type, by incident type, by triage, by provider
- Program Type: REM or CO programs
- Date Type: Report date, event date, or RE without Event date
- To Date: Ending parameter for the search criteria
- MFP Participant: Yes or No

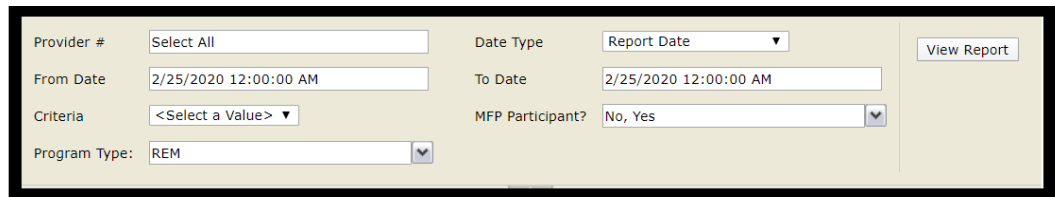


Figure 330-Reportable Events Reports - Summary Report - Search Panel

6. Select the **View Report** button twice.

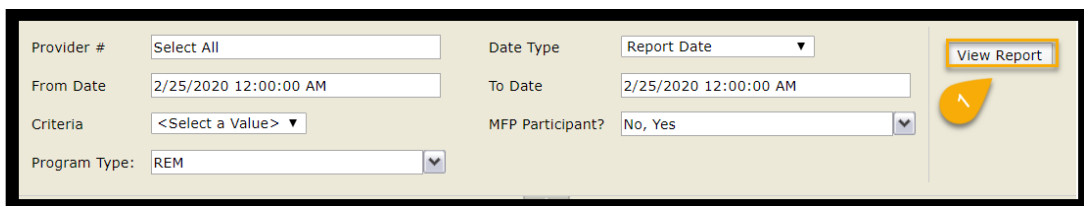


Figure 331-Reportable Events Reports – Summary Report - View Report

- The system will generate the RE – Summary Report. To drill down into a reportable event, select the appropriate RE number hyperlink; this will direct you to the Reportable Event – Summary.

RE - Summary Report

Search Criteria:
Provider ID: Select All
Date Type: Report Date
Start Date: 2/25/2000
End Date: 2/25/2020
Criteria: By Triage
MFP Participant?: No, Yes
Program Type: REM

By Triage

Triage	Open	Closed	Total
Immediate Jeopardy	1	-	1
N/A	4	3	7
Total	5	3	8

Figure 332- Reportable Events Report – Summary Report

- Report generated can be downloaded and saved for future use. To do this, click on the **Save icon** available just below the region where search criteria was entered. A list of formats for saving the report is provided.
- Select the desired format. A new file with the contents of the report will be generated in that file format which the user can store on the computer.

Date Created: 2/25/2020 11:52:47 AM

Search Criteria:
Provider ID: Select All
Date Type: Report Date
Start Date: 2/25/2000
End Date: 2/25/2020
Criteria: By Triage
MFP Participant?: No, Yes
Program Type: REM

By Triage

Triage	Open	Closed	Total
Immediate Jeopardy	1	-	1
N/A	4	3	7
Total	5	3	8

Figure 333-Reportable Events Report - Summary Report - Download

22 REM Reports

22.1 REM Activity Report

This report allows authorized users to view the total number of Clients in summary view and Client details in detail view, with various combinations of REM Activities (Activity, With, Type and Setting) from the REM Activities module, based on the input parameters.

22.1.1 Primary Actors

DEPARTMENT	ROLES
CMA	CMA REM Administrator, CMA REM Supervisor, CMA REM Intake Specialist, CMA REM Provider Relations Rep (For Clients assigned to the agency), CMA REM Case Manager (For their assigned Clients)
MDH	MDH REM Administrator, MDH REM Intake Nurse, MDH REM Intake Specialist, MDH REM Physician Advisor

Table 41-REM Activity Report - Primary Actors

22.1.2 View REM Activity Report

1. Select the **Reports** tab.
2. Choose the **REM Reports** in category.
3. Click **Filter** to see the list of REM Reports.
4. To view the **REM Activity Report**, click the **View** hyperlink.

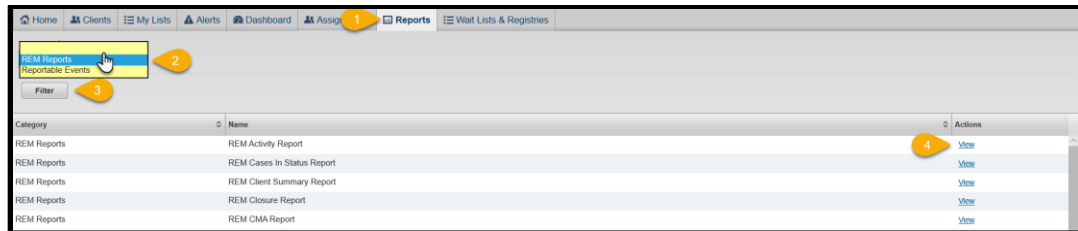


Figure 334-REM Reports-REM Activity Report-View

5. Select the input parameters for the search criteria in the following fields:
 - a. Start Date – Activities added from this date
 - b. End Date – Activities added through this date
 - c. Activity - List of the Activity options from the Activity form
 - d. With - List of the With options from the Activity form
 - e. Type – List of the Type options from the Activity form
 - f. Setting – List of the Setting options from the Activity form
 - g. REM CMA – List of Case Management Agencies and MDH REM. MDH will be assigned for Clients unable to locate.

h. Case Manager – List of the CMA Case Managers

The screenshot shows a search panel with the following fields and values:

- Start Date: 2/17/2020 12:00:00 AM
- End Date: 2/17/2020 12:00:00 AM
- Activity: Phone, Phone Attempt, Visit, Visit Att
- With: MDH, Facility, PCP, Client/Family, DSS
- Type: Assessment, Case Management Plan
- Setting: Clinic, Community, Day Program, Doc
- REM CMA: MDH, REM Agency, THE COORDINATI
- Case Manager: N/A

A "View Report" button is located in the top right corner. At the bottom, there is a pagination indicator showing "1 of 1".

Figure 335-REM Reports -REM Activity-Search Panel

The screenshot shows a search panel with the following fields and values:

- Start Date: 2/17/2020 12:00:00 AM
- End Date: 2/17/2020 12:00:00 AM

Figure 336-REM Activity Report – Search Panel-Date

The screenshot shows the search panel with the "Activity" dropdown menu open. The "Start Date" is 2/17/2020 12:00:00 AM. The "Activity" dropdown is currently set to "Phone, Phone Attempt, Visit, Visit Att". The expanded menu shows the following options, all of which are checked:

- (Select All)
- Phone
- Phone Attempt
- Visit
- Visit Attempt
- Email
- Documentation
- Transfer

The "Type" and "REM CMA" fields are visible but not selected. A pagination indicator shows "1".

Figure 337-REM Activity Report – Search Panel-Activity

The screenshot shows the search panel with the "With" dropdown menu open. The "End Date" is 2/17/2020 12:00:00 AM. The "With" dropdown is currently set to "MDH, Facility, PCP, Client/Family, DSS". The expanded menu shows the following options, all of which are checked:

- (Select All)
- MDH
- Facility
- PCP
- Client/Family
- DSS
- Provider
- Referral Source

The "Setting" and "Case Manager" fields are visible but not selected.

Figure 338-REM Activity Report – Search Panel-With

Start Date: 2/17/2020 12:00:00 AM

Activity: Phone, Phone Attempt, Visit, Visit Att

Type: Assessment, Case Management Plan

REM CMA:

- (Select All)
- Assessment
- Case Management Plan
- Request for Case Closure
- Service Coordination
- Letters
- Eligibility
- Assignment

Figure 339-REM Activity Report – Search Panel-Type

End Date: 2/17/2020 12:00:00 AM

With: MDH, Facility, PCP, Client/Family, DSS

Setting: Clinic, Community, Day Program, Doc

Case Manager:

- (Select All)
- Clinic
- Community
- Day Program
- Doctor's Office
- Home
- Hospital
- N/A

Figure 340-REM Activity Report – Search Panel-Setting

6. After selecting search criteria, click **View Report** two (2) times. Results matching the search criteria are then displayed in the Summary Report.

Start Date: 1/17/2020 12:00:00 AM End Date: 2/17/2020 12:00:00 AM

Activity: Phone, Phone Attempt, Visit, Visit Att With: MDH, Facility, PCP, Client/Family, DSS

Type: Assessment, Case Management Plan Setting: Clinic, Community, Day Program, Doc

REM CMA: MDH, REM Agency, THE COORDINATI Case Manager: N/A

1 of 1

View Report

Figure 341-REM Activity Report – Search Panel-View Report

7. System displays Summary Report with the number of Clients per activity and various other details.
 - “Number of Clients” field will be displayed with a hyperlink.
 - To view a detailed Client list for each Activity, **click** the corresponding numeric hyperlink.

REM Activity Report						
Search Criteria:						
Start Date:	1/17/2020					
End Date:	2/17/2020					
Activity:	Phone; Phone Attempt; Visit; Visit Attempt; Email; Documentation; Transfer; Mail Sent; Mail Received; Meeting; Fax; Research; Report; Appointment; Other					
With:	MDH; Facility; PCP; Client/Family; DSS; Provider; Referral Source; Supervisor; EVS; MCO SNC; MMIS; REM CM; Other Physician; REM Intake; MCO; Physician Advisor; Nursing; Professional; Other; Provider Relations Rep					
Type:	Assessment; Case Management Plan; Request for Case Closure; Service Coordination; Letters; Eligibility; Assignment; Cost & Utilization Data Review; Overall Decision Form; Consent Form; Referral; Waiver Transaction Form; None; Other					
Setting:	Clinic; Community; Day Program; Doctor's Office; Home; Hospital; N/A; Other; School					
REM CMA:	MDH; REM Agency; THE COORDINATING CENTER					
Case Manager:	N/A					
Report Date:	02/17/2020					
Activity Name	Activity	With	Type	Setting	Number of Clients	
Appointment	Appointment	Client/Family	Assessment		1	
			Assignment		1	
			Case Management Plan		2	
	PCP	None			1	
Documentation	Documentation	Client/Family	Assessment		1	
			DSS	Assignment		1
			Nursing	Other		1
			REM CM	Service Coordination		1
Email	Email	MDH	Overall Decision Form		1	
			PCP	Letters		1
			Physician Advisor	Assessment		1
Fax	Fax	PCP	Letters		1	
			Referral Source	Letters		1
			REM CM	Service Coordination		1
Mail Received	Mail Received	Facility	Letters		1	
			Referral Source	Referral		1
Mail Sent	Mail Sent	Client/Family	Letters		3	
Other	Other	Other	Other	Other	1	

Figure 342-REM Activity Report

8. Upon clicking on the hyperlink, the **REM Activity Detail Report** will display. The user can click on the **Client ID** hyperlink to view the Client Summary in LTSSMaryland. The report table can be sorted by selecting the small arrows in any of the column headers.

REM Activity Detail Report												
* Click blue arrow above to go back to the parent report												
Total Number of Records Returned: 1												
First Name	Last Name	Client ID	MA Number	Activity	With	Type	Setting	Added By	Activity Date	Duration (h:m:s)	Assigned REM CMA Agency	Assigned REM CMA Case Manager Supervisor
DOF_PraPopField1	Test	26600120246216	13615400001	Appointment	Client/Family	Assessment		MDH REM Administrator1	1/17/2020	00:15	N/A	N/A

Figure 343-REM Activity Detail Report

9. The report can be exported to the local hard drive. To do this, click on the **Save icon** available just below the region where search criteria was entered. A list of formats for saving the report is provided.
 - Select the desired format. A new file with the contents of the report will be generated which the user can save on the computer.

The screenshot shows the 'REM Activity Report' interface. At the top, there are search criteria filters: Start Date (1/27/2020 12:00:00 AM), End Date (2/27/2020 12:00:00 AM), Activity (Phone, Phone Attempt, Visit, Visit), With (MDH, Facility, PCP, Client/Family), Type (Assessment, Case Management Pl), Setting (Clinic, Community, Day Program), REM CMA (DDA, LAHWU, MDH, MDH, MMIS), and Case Manager (N/A). A 'View Report' button is on the right. Below the filters is a navigation bar with a '1 of 3' indicator and a 'Save' icon circled in orange. The main content area displays the report title 'REM Activity Report' and a 'Search Criteria' section listing the selected filters. Below this is a table with columns: Activity Name, Activity, With, Type, Setting, and Number of Clients.

Activity Name	Activity	With	Type	Setting	Number of Clients
Appointment	Appointment	Client/Family	Assessment		8
			Case Management		7

Figure 344-REM Activity Report - Download

22.2 REM Cases in Status Report

This report provides a list of all the Clients with their REM Enrollment or Case Management in a certain status based on the time frame selected and/or the selected specific status for the time frame.

Important: In a Scenario where a Client’s status changed multiple times during the selected time period, the report will show the status as of the end date of the report search criteria.

Applicable statuses in this report: Approved for Enrollment; Declined; Denied for Enrollment; Enrolled; Pending Consent; Pending Declined; Pending Incomplete; Pending Medical Advisor; Pending Received; Referred to Case Management; Referred to Service Coordination

22.2.1 Primary Actors

DEPARTMENT	ROLES
MDH	MDH REM Administrator

Table 42-REM Cases in Status Report - Primary Actors

22.2.2 View REM Cases in Status Report

1. Select the **Reports** tab.
2. Choose the **REM Reports** in category.
3. Click **Filter** to see the list of REM Reports.
4. To view the **REM Cases in Status Report**, click the **View** hyperlink.



Figure 345-REM Reports-REM Cases in Status Report-View

5. Select the input parameters for the search criteria in the following fields:
 - a. Start Date – Date range from this date
 - b. End Date – Date range through this date
 - c. Status (Refer to section “REM Cases in Status – Detailed”)

Start Date (mm/dd/yyyy) End Date (mm/dd/yyyy)

Figure 346-REM Cases in Status Report-Search Panel-Date

Start Date (mm/dd/yyyy) End

Status ▼

(Select All)
 Approved for Enrollment
 Declined
 Denied for Enrollment
 Enrolled
 Pending Consent
 Pending Declined
 Pending Incomplete
 Pending Medical Advisor

Date Created: 2/20/2020 11:00:00 AM
 Search Criteria:
 Start Date:

Figure 347-REM Cases in Status Report-Search Panel-Status

- After selecting search criteria, click **View Report**. Results matching the search criteria are displayed in the summary report.

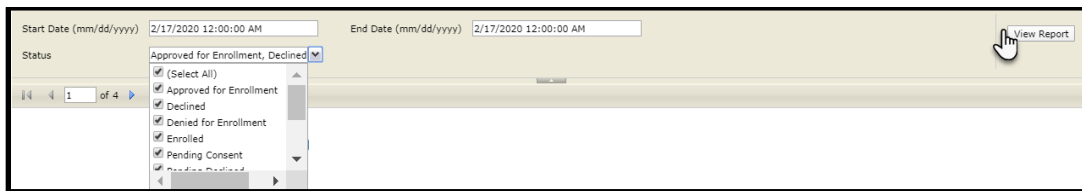


Figure 348-REM Cases in Status Report – View Report

- Upon clicking on the hyperlink, the **REM Cases in Status Report** will display. The user can click on the **Client ID hyperlink** to view the Client Summary in LTSSMaryland. The report table can be sorted by selecting any column.

REM Cases In Status Report									
Search Criteria:									
Start Date:	2/17/2020								
End Date:	2/17/2020								
Status:	Approved for Enrollment; Declined; Denied for Enrollment; Enrolled; Pending Consent; Pending Declined; Pending Incomplete; Pending Medical Advisor; Pending Received; Referred to Case Management; Referred to Service Coordination								
Report Date:	02/17/2020								
Total Number of Records Returned:	134								
First Name	Last Name	Client ID	MA Number	LTSS Status	Report Status	Status Assigned On	Status Ended On	Days In Status	Initiated By
SCF_Regression	Jay	2870046CS550220	45454545600	N/A	Approved for Enrollment	2/17/2020	N/A	1	MDH REM Intake Nurse1
SCF_Regression	Jay	2870046CS550220	45454545600	N/A	Enrolled	2/17/2020	N/A	1	MDH REM Intake Nurse1
ODF_Deny	Test	28100SYDOME0200	12345678929	N/A	Pending Consent	2/11/2020	N/A	7	MDH REM Administrator1
Test20	REMReport	1180035ET400201	38495034567	N/A	Pending Declined	11/8/2019	N/A	102	MDH REM Administrator1
abcd	test	2130052CS020211	01010122222	N/A	Pending Declined	11/13/2019	N/A	97	MDH REM Intake Nurse2
Regression_ODFClient3	Test	10800DGERAF0201	N/A	N/A	Pending Declined	10/24/2019	N/A	117	MDH REM Intake Nurse2
Robin	Banks	1210944OR221201	8484959521	Pending Nurse Review 2	Pending Incomplete	12/11/2019	N/A	69	MDH REM Administrator1
Robin	Banks	1210944OR221201	8484959521	On Hold	Pending Incomplete	12/28/2019	N/A	52	MDH REM Intake Nurse1
Chris	Barbara	23291U6HCXY9100	34543534554	Pending Nurse Review 1	Pending Incomplete	12/27/2019	N/A	53	MDH REM Administrator1
Carolyn	Barbara	131939JACNB9100	45436543444	In Progress	Pending Incomplete	1/6/2020	N/A	43	MDH REM Administrator1
Anita	Bathe	1119074NA897101	N/A	In Progress	Pending Incomplete	11/21/2019	N/A	89	MDH REM Administrator1
IntakeSnapshot	Client_1	2299800NI049111	19028400000	In Progress	Pending Incomplete	12/17/2019	N/A	63	MDH REM Administrator1
ReferralReport	Client_1	2200022EB230221	18619100000	In Progress	Pending Incomplete	12/20/2019	N/A	60	MDH REM Intake Nurse1
REMOverview	CMP	20897M4OL1G9121	14589658951	In Progress	Pending Incomplete	10/22/2019	N/A	119	CMA REM Administrator1

Figure 349-REM Cases in Status Report

8. Report can be exported to the local hard drive. To do this, click on the **Save icon** available just below the region where search criteria was entered. A list of formats for saving the report is provided.
 - Select the desired format. A new file with the contents of the report will be generated which the user can save on the computer.

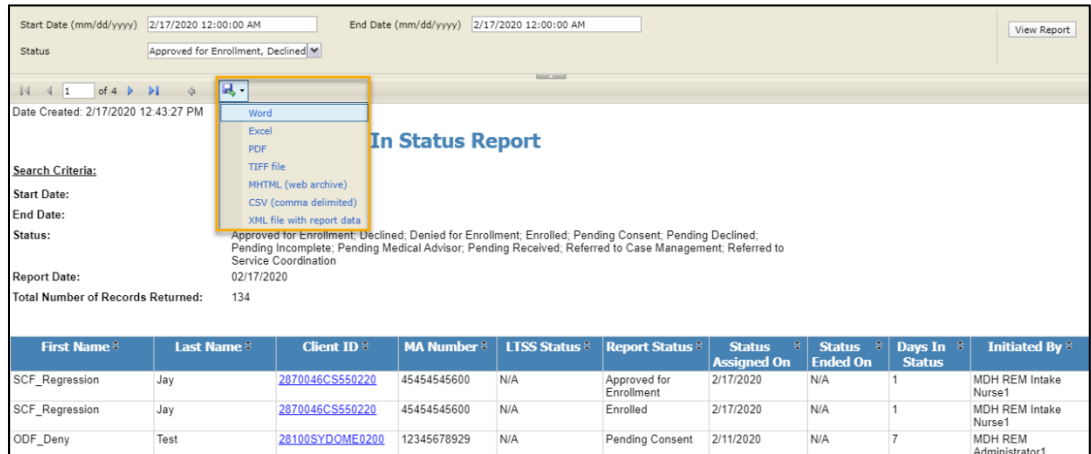


Figure 350-REM Cases in Status Report-Download

22.2.3 REM Cases in Status - Detailed

INFORMATION FOR EACH STATUS IS DEFINED AS FOLLOWS:	
Approved for Enrollment	This will search for Clients whose REM Intake Referral form changed to status Approved for Enrollment during the date range entered.
Denied for Enrollment	This will search for Clients whose REM intake Referral form changed to status Denied for Enrollment during the date range entered.
Enrolled	This will search for Clients who had an Active and approved REM Overall Decision Form (ODF) submitted for the REM program during the date range entered.
Declined	This will search for Clients who had a Decline REM Overall Decision Form (ODF) submitted during the date range entered.
Pending Incomplete	This will search for all the Clients whose REM Intake Referral form is in the status listed below as of the system date. (NOTE: This will ignore the start and end date range in parameter) "In-Progress", "Pending Nurse Review 1", "Pending Nurse Review 2", "Pending Additional Information", "On-Hold".
Pending Declined	This will search for Clients whose REM Consent form is in the status of Submitted and "Consent to enroll in REM?" is checked Declined,

INFORMATION FOR EACH STATUS IS DEFINED AS FOLLOWS:	
	<p>and the Client does not have an associated active Decline REM ODF.</p> <p>(NOTE: This will ignore the start and end date range in parameter)</p>
Pending Consent	<p>This will search for Clients whose REM Consent form is in the status of “In-Progress” as of the system date.</p> <p>(NOTE: This will ignore the start and end date range in parameter)</p>
Pending Medical Advisor	<p>This will search for Clients whose REM Intake Referral form status is in “Pending Medical Advisor” as of the system date.</p> <p>(NOTE: This will ignore the start and end date range in parameter)</p>
Pending Received	<p>This will search for Clients whose REM Intake Referral form status is in “In Progress” as of the system date.</p> <p>(NOTE: This will ignore the start and end date range in parameter)</p>
Referred Case Management	<p>This will search for Clients who had an Approved REM ODF submitted during the date range entered or had an ODF five (5) days before the start date (submission date), and the Client has an active REM CMA assigned.</p> <p>(NOTE: This does not include MDH as assigned CMA)</p> <p>The report will include Clients who had a CMA agency assigned or unassigned.</p> <p>(NOTE: If a CMA agency was unassigned and then a CMA agency was assigned during the date range, the Client will not appear on this list)</p>
Referred to Service Coordination:	<p>This will search for Clients whose REM Consent form is in status of Submitted with “Client consent to enroll in REM” checked Accepted, and “Refer to Service Coordination” checked Yes, during the date range in parameter.</p> <p>(NOTE: In the date range the Service Coordination status might have changed to Completed, but the system will still display the Client as the Client was referred during the date range)</p>

Figure 351-REM Status Overview: REM Cases in Status Report

22.3 REM Client Summary Report

This report allows authorized users to view Clients that have an active REM Intake Referral form with four (4) report output types:

- Active REM Clients with Specified Primary Diagnosis
- Active REM Clients with REM Diagnosis Expiration Between (Start and End Dates)
- Active REM Clients with Specified Diagnosis as of (Date)
- Active REM Clients with Expired REM Qualifying Diagnosis

22.3.1 Primary Actors

DEPARTMENT	ROLES
CMA	CMA REM Administrator, CMA REM Supervisor (For Clients assigned to the agency), CMA REM Case Manager (For their assigned Clients)
MDH	MDH REM Administrator

Table 43-REM Client Summary Report - Primary Actors

22.3.2 View REM Client Summary Report

1. Select the **Reports** tab.
2. Choose the **REM Reports** in category.
3. Click **Filter** to see the list of REM Reports.
4. To view the **REM Client Summary Report**, click the **View** hyperlink.

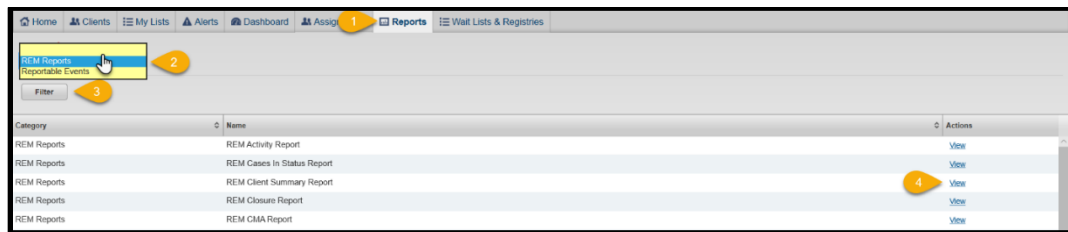


Figure 352-REM Reports-REM Client Summary Report-View

5. Select the input parameters for the search criteria in the following fields:
 - a. Start Date
 - b. End Date
 - c. Report Type
 - d. Age Out
 - e. REM Diagnosis Search
 - f. REM Diagnosis

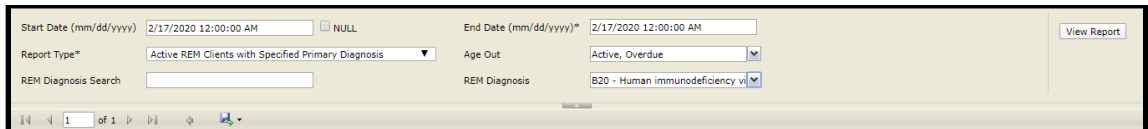


Figure 353-REM Client Summary Report – Search Panel

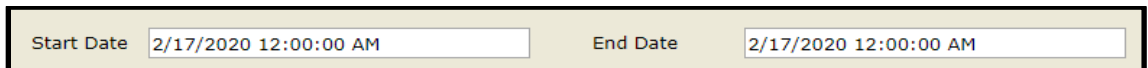


Figure 354-REM Client Summary Report – Search Panel-Date

- The user can select one of four (4) Report Types. (Refer to “REM Client Summary Report Type – Detailed” section)

Figure 355-REM Client Summary Report – Search Panel-Report Type

Figure 356-REM Client Summary Report – Search Panel-Age Out

Figure 357-REM Client Summary Report – Search Panel-Report Type

Figure 358-REM Client Summary Report – Search Panel-REM Diagnosis

After selecting the search criteria, click **View Report** two (2) times. Summary results are displayed.

Figure 359-REM Client Summary Report – Search Panel-View Report

- To view the results for a specific REM Diagnosis in the **“Number of Adults”** or **“Number of Minors”** column, **click** the corresponding numeric hyperlink to display the REM Client Summary Details Report. To view the results for all REM Diagnoses, **click** the numeric hyperlink next to Total to display the REM Client Summary Details Report.

REM Client Summary Report		
Search Criteria:		
Start Date:	1/17/2020	
End Date:	2/17/2020	
Report Type:	Active REM Clients with Specified Primary Diagnosis	
REM Diagnosis Search:		
REM Diagnosis:	308 Value were selected in the input, click + to see all	
Report Date:	02/17/2020	
REM Diagnosis	Number of Adults	Number of Minors
B20 - Human immunodeficiency virus [HIV] disease	0	3
D66 - Hereditary factor VIII deficiency	3	0
E840 - Cystic fibrosis with pulmonary manifestations	0	1
G7101 - Duchenne or Becker muscular dystrophy	2	0
G7102 - Facioscapulohumeral muscular dystrophy	1	1
G800 - Spastic quadriplegic cerebral palsy	2	1
G8250 - Quadriplegia, unspecified	0	1
Q02 - Microcephaly	0	1
Q359 - Cleft palate, unspecified	0	1
Z9911 - Dependence on respirator [ventilator] status	3	4
Total	11	13

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Figure 360-REM Client Summary Report

- Upon clicking on the hyperlink, the **REM Client Summary Details Report** will display. The user can click on the **Client ID hyperlink** to view the Client Summary in LTSSMaryland. The report table can be sorted by selecting arrows next to any column name.

REM Client Summary Details Report												
* Click blue arrow above to go back to the parent report												
Total Number of Records Returned: 3												
Total: 0												
Client ID	MA #	Client First Name	Client Last Name	DOB	Age	Minor/Adult	REM Qualifying Diagnosis	REM Age out Date	REM Discontinuation Date	Assigned Agency	Assigned Case Manager	Assigned CHA Supervisor
210051188110324	1179999900	Regression_Jay11	Test	1/30/2005	15	Minor	B20 - Human immunodeficiency virus [HIV] disease	1/29/2026	N/A	REM 2	N/A	N/A
21007268880225	787878780	Regression_Jay10	Test	1/27/2009	11	Minor	B20 - Human immunodeficiency virus [HIV] disease	1/26/2030	N/A	THE COORDINATING CENTER	CHA REM Case Manager1	CHA REM Supervisor 1
210020404101210		Daria	UAT Client	1/30/2012	8	Minor	B20 - Human immunodeficiency virus [HIV] disease	1/29/2033	N/A	THE COORDINATING CENTER	CHA REM Case Manager2	CHA REM Supervisor 1

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Figure 361-REM Client Summary Details Report

9. The report can be exported to the local hard drive. To do this, click on the **Save icon** available just below the region where search criteria was entered. A list of formats for saving the report is provided.
 - Select the desired format. A new file with the contents of the report will be generated which the user can save on the computer.

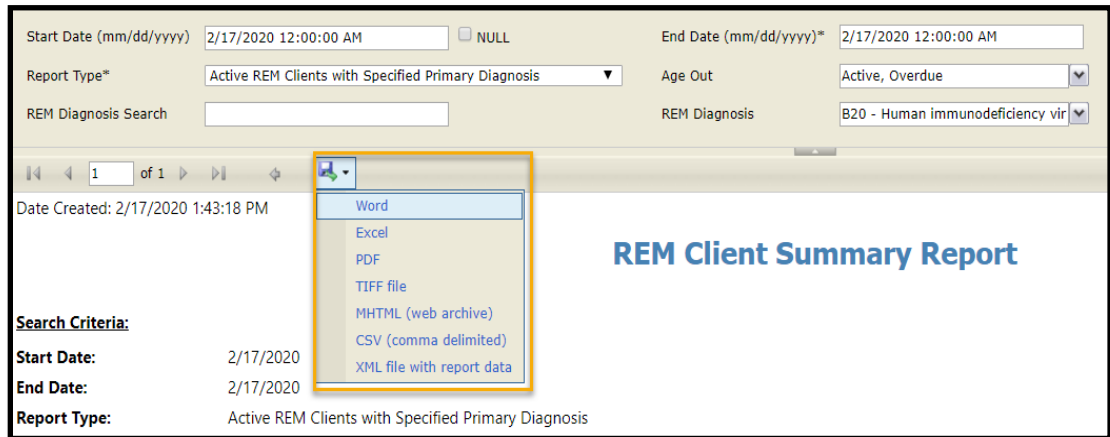


Figure 362-REM Client Summary Report – Download

22.3.3 REM Client Summary Report Type - Detailed

INFORMATION FOR EACH STATUS IS DEFINED AS FOLLOWS:	
Active REM Clients with Specified Primary Diagnosis	Provides a list of Clients enrolled in REM during report date range where the REM Qualifying Diagnosis on their active REM Intake Referral form matches the selected input. (NOTE: This includes Clients enrolled in REM even when a REM Qualifying Diagnosis has reached its Age Out Date)
Active REM Clients with REM Diagnosis Expiration between (Date)	Provides a list of Clients enrolled in REM during report date range and their Age Out Date falls within the Start and End date of the report.
Active REM Clients with Specified Diagnosis as of (Date)	Provides a list of Clients enrolled in REM during report date range with any specified diagnosis on the Active REM Intake Referral. This includes diagnoses that are not the REM Qualifying Diagnosis. (NOTE: This includes Clients enrolled in REM even when a REM Qualifying Diagnosis has reached its Age Out Date)
Active REM Clients with Expired REM Qualifying Diagnosis	Provides a list of Clients enrolled in REM during report date range when the REM Qualifying Diagnosis has reached its Age Out Date as of the system date.

Table 44-REM Status Overview: REM Client Summary Report

22.4 REM Closure Report

This report allows authorized users to view a list of Clients whose Request for Case Closure form is in the status of “Pending MDH Review” and / or “Clarification Requested” as of the current system date.

22.4.1 Primary Actors

DEPARTMENT	ROLES
CMA	CMA REM Administrator, CMA REM Supervisor (For Clients assigned to the agency), CMA REM Case Manager (For their assigned Clients)
MDH	MDH REM Administrator

Table 45-REM Closure Reports - Primary Actors

22.4.2 View REM Closure Report

1. Select the **Reports** tab.
2. Choose the **REM Reports** in category.
3. Click **Filter** to see the list of REM Reports.
4. To view the **REM Closure Report**, click the **View** hyperlink.

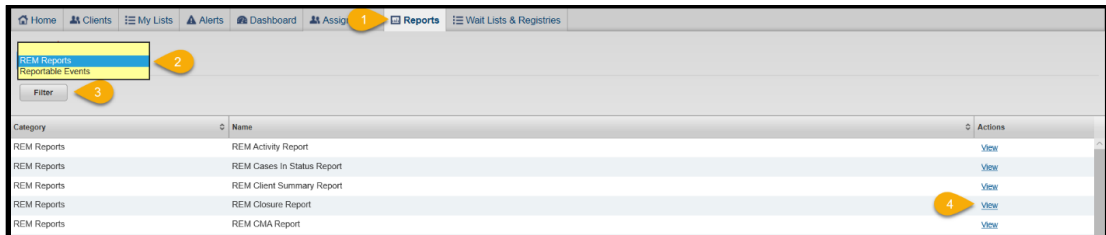


Figure 363-REM Reports-REM Closure Report

5. Select the preferred search criteria from the **Status** field.
6. To view the **REM Closure Report**, click the **View Report** button two (2) times.

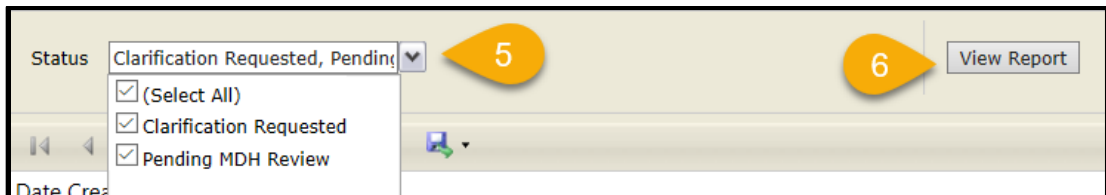


Figure 364-REM Closure Report – Search Panel-Status

7. The **REM Closure Report** will be displayed.
 - This report will display the Client details with the status of their REM Case Closure form, number of days the form has been in the current status, and CMA details.
 - The user can click on the **Client ID hyperlink** to view the Client Summary in LTSSMaryland. The report table can be sorted by selecting arrows next to any column name.

REM Closure Report										
Search Criteria:										
Status: Clarification Requested, Pending MDH Review										
Report Date: 02/19/2020										
Total Number of Records Returned: 8										
First Name	Last Name	Client ID	N/A Number	Status	In Status Over 14 Days	PDN	Assigned REM CMA Agency	REM CMA Case Manager Supervisor	Assigned REM CMA Case Manager	
Test22	REMReports	120794E1577111	76578785476	Clarification Requested	Yes	No	N/A	N/A	N/A	
REMOvenview	CMP	2089714CL106121	14589658951	Pending MDH Review	Yes	No	THE COORDINATING CENTER	CMA REM Supervisor 1	CMA REM Case Manager3	
Freut8	Feedback	1990024ED379210	23145627831	Pending MDH Review	Yes	No	THE COORDINATING CENTER	CMA REM Supervisor 1	CMA REM Case Manager2	
Thomas CO REM	REMAssessment	2118622H1779100	72727272722	Clarification Requested	Yes	Yes	THE COORDINATING CENTER	CMA REM Supervisor 1	CMA REM Case Manager3	
Joe	Test	127007CJ750200	98766789967	Pending MDH Review	Yes	Yes	THE COORDINATING CENTER	CMA REM Supervisor 1	CMA REM Case Manager3	
Ela	UAT	1220024LE311200	N/A	Clarification Requested	Yes	Yes	THE COORDINATING CENTER	CMA REM Supervisor 1	CMA REM Case Manager1	
Juli	UAT Client	181972EUJ0W9100	N/A	Pending MDH Review	Yes	No	THE COORDINATING CENTER	CMA REM Supervisor 1	CMA REM Case Manager2	
Meaghan	UATClient	281042XEMS71200	N/A	Pending MDH Review	Yes	No	THE COORDINATING CENTER	CMA REM Supervisor 1	CMA REM Case Manager1	

Figure 365-REM Closure Report

8. The report can be exported to the local hard drive. To do this, click on the **Save icon** available just below the region where search criteria was entered. A list of formats for saving the report is provided.
 - Select the desired format. A new file with the contents of the report will be generated which the user can save on the computer.

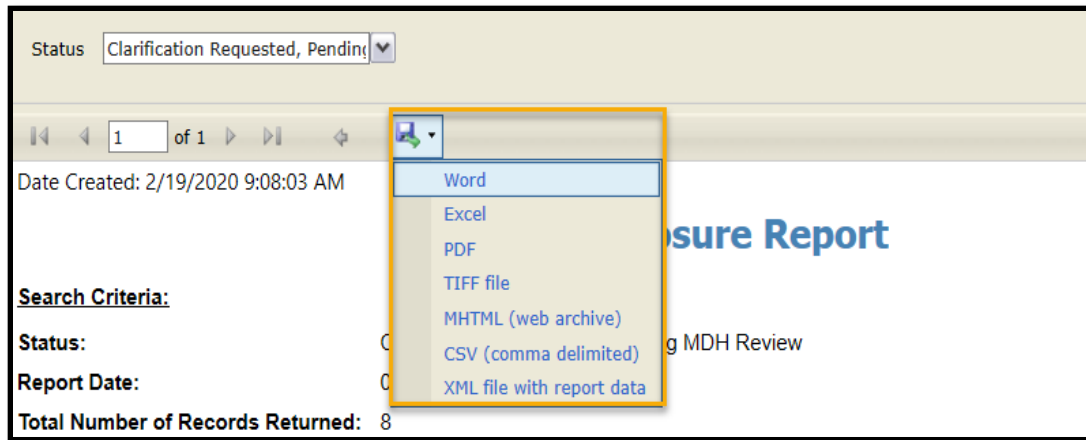


Figure 366-REM Closure Report-Download

22.5 REM CMA Report

This report allows authorized users to view two (2) sub reports:

1. A list of the total number of Clients assigned to REM Case Management Agency (CMA) and/or MDH as CMA during the date range entered. This report will also display a Client who had already been assigned and was unassigned from the CMA within the date range.
2. A list of the total number of new Clients assigned to the REM Case Management Agency (CMA) and/or MDH as CMA based on the current system date.

NOTE: These reports will also have a Detailed Report available by clicking the **Hyperlink Number**.

22.5.1 Primary Actors

DEPARTMENT	ROLES
CMA	CMA REM Administrator, CMA REM Supervisor (For Clients assigned to the agency), CMA REM Case Manager (For their assigned Clients)
MDH	MDH REM Administrator

Table 46-REM CMA Report - Primary Actors

22.5.2 View REM CMA Report

1. Select the **Reports** tab.
2. Choose the **REM Reports** in category.
3. Click **Filter** to see the list of REM Reports.
4. To view the **REM CMA Report**, click the **View** hyperlink.

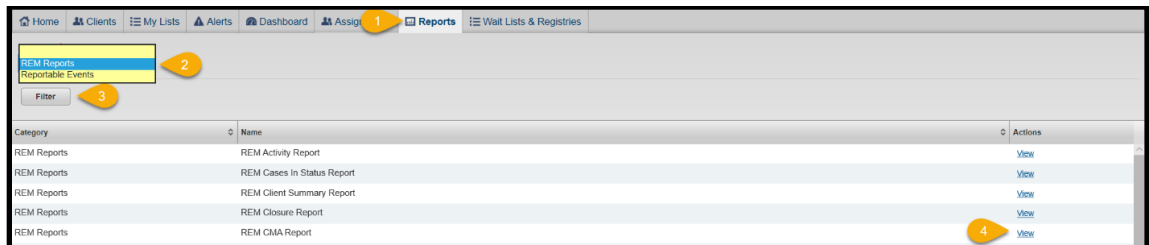


Figure 367-REM Reports-REM CMA Report-View

5. Select the input parameters for the search criteria in the following fields:
 - a. Start Date
 - b. End Date
 - c. REM CMA – TCC, MDH

NOTE: This list displays all the active Provider Type 87 agencies in MMIS

NOTE: MDH will be assigned as CMA if a Client is Unable to Locate status

- After selecting search criteria, click **View Report**. Results matching the search criteria are displayed in the Summary Report.

Figure 368-REM CMA Report – Search Panel-View Report

- To view the displayed results, **click** on the corresponding numeric hyperlink.

REM CMA Report

Search Criteria:
Start Date: 1/19/2020
End Date: 2/19/2020
REM CMA: MDH; REM 2; REM Agency; THE COORDINATING CENTER
Report Date: 02/19/2020

Current Assignment:

Agency	Case Manager	# of Assigned Clients
Total		194
MDH	N/A	7
	CMA REM Case Manager2	1
	CMA REM Case Manager3	1
	Sub-Total	9
REM 2	Un-assigned	3
	Agency 2 Case Manager	2
	CMA REM Case Manager1	1
	Sub-Total	6
THE COORDINATING CENTER	Un-assigned	44
	Agency 3 REM Case Manager 1	1
	CMA REM Case Manager1	55
	CMA REM Case Manager2	46
	CMA REM Case Manager3	33
Sub-Total	179	

Assigned During 1/19/2020 to 2/19/2020

Agency	# of Clients
Total	86
MDH	9
REM 2	8

Figure 369-REM CMA Report

- Upon clicking on the hyperlink, the **REM Client Detail Report** will display. The user can click on the **Client ID hyperlink** to view the Client Summary in LTSSMaryland. The report table can be sorted by selecting arrows next to any column name.

First Name	Last Name	Client ID	MA#	Agency Assignment Date	Assigned REM CMA Agency	Assigned REM CMA Case Manager	REM CMA Case Manager Supervisor
Isas	Tester	121902251339131	7777777777	12/17/2019	MDH	N/A	N/A
Consent_Form2	Test	25100UF0C0230	31993200000	11/27/2019	MDH	N/A	N/A
ODF_Deny	Test	28100SYD0ME0200	12345678929	02/11/2020	MDH	N/A	N/A
Letters_Client2	test	1780009EL040220	11774400000	12/17/2019	MDH	N/A	N/A
158217_Client1	Test	283000051070210	15821700000	12/27/2019	MDH	N/A	N/A
Regression_ODFClient11	Test	204003WER7H0221	78451245898	11/08/2019	MDH	N/A	N/A
SCFRegression_Client3	Test	2140044CS440211	87878788888	11/28/2019	MDH	N/A	N/A

Figure 370-REM Client Detail Report

- The report can be exported to the local hard drive. To do this, click on the **Save icon** available just below the region where search criteria was entered. A list of formats for saving the report is provided.
 - Select the desired format. A new file with the contents of the report will be generated which the user can save on the computer.

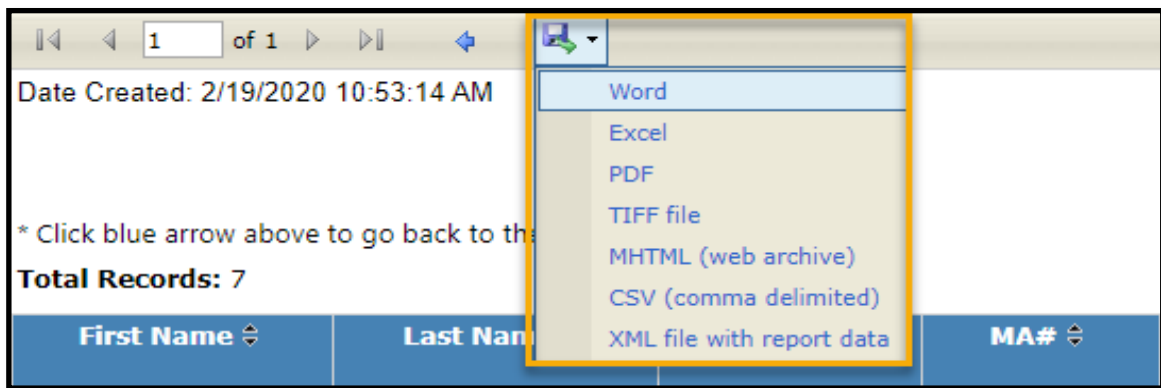


Figure 371-REM CMA Report-Download

22.6 REM Denials Report

This report allows authorized users to view a list of Clients with a denied Overall Decision Form grouped by Denial Reasons based on the input criteria selected.

22.6.1 Primary Actors

DEPARTMENT	ROLES
MDH	MDH REM Administrator

Table 47-REM Denials Report - Primary Actors

22.6.2 View REM Denials Report

1. Select the **Reports** tab.
2. Choose the **REM Reports** in category.
3. Click **Filter** to see the list of REM Reports.
4. To view the **REM Denials Report**, click the **View** hyperlink.

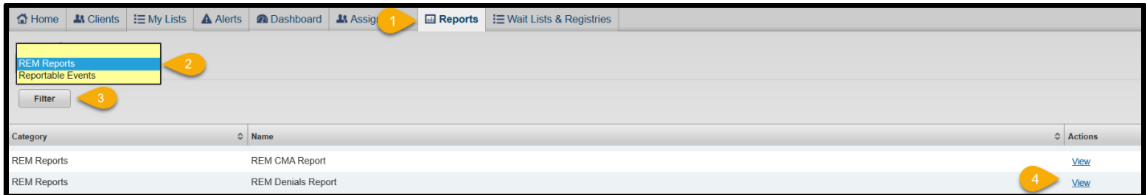


Figure 372-REM Reports-REM Denials Report-View

5. Select the input parameters for the search criteria in the following fields:
 - a. Start Date
 - b. End Date
 - c. Reasons for Denial

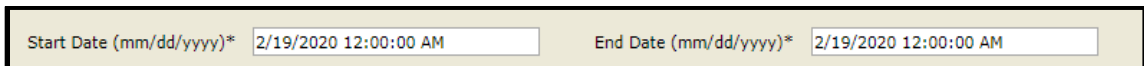


Figure 373-REM Denials Report – Search Panel-Date

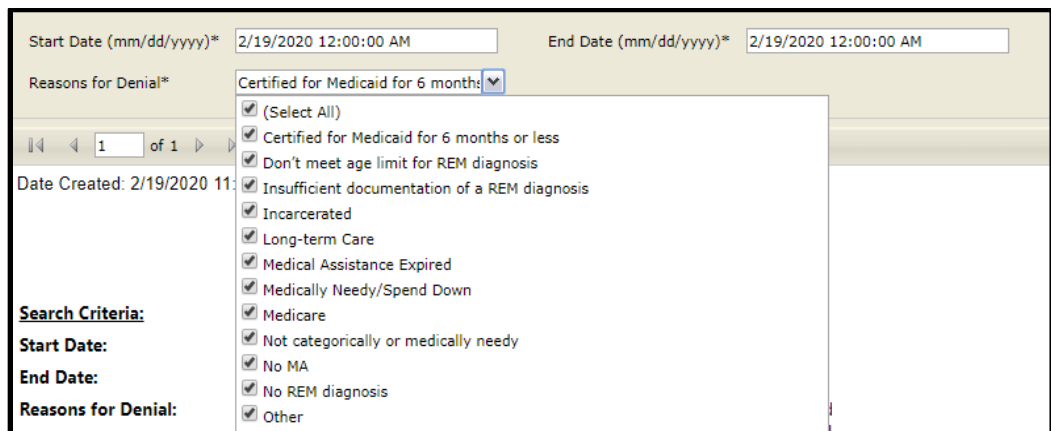


Figure 374-REM Denials Report – Search Panel-Reasons for Denial

6. After selecting search criteria, click **View Report**. Results matching the search criteria are displayed.

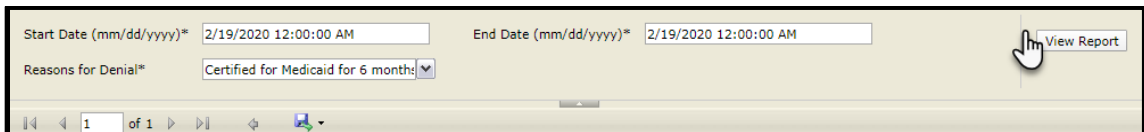


Figure 375-REM Denials Report-Search Panel-View Report

7. To view the displayed results for each Reason for Denial in the “Count” column, click the corresponding numeric hyperlink.
 - Percent field in the summary report displays the total percentage of denied Clients for individual Denial Reasons within the date range.

REM Denials Report		
Search Criteria:		
Start Date:	1/19/2020	
End Date:	2/19/2020	
Reasons for Denial:	Certified for Medicaid for 6 months or less, Don't meet age limit for REM diagnosis, Insufficient documentation of a REM diagnosis, Incarcerated, Long-term Care, Medical Assistance Expired, Medically Needy/Spend Down, Medicare, Not categorically or medically needy, No MA, No REM diagnosis, Other	
Report Date:	2/19/2020 11:14 AM	
Reason for Denial	Count	Percent
Insufficient documentation of a REM diagnosis	1	33.33%
Incarcerated	1	33.33%
Medical Assistance Expired	1	33.33%
Sub Total	3	100.00%

Figure 376-REM Denials Report

8. Upon clicking on the hyperlink, the **REM Denials Detail Report** will display. The user can click on the **Client ID hyperlink** to view the Client Summary in LTSSMaryland. The report table can be sorted by selecting arrows next to any column name.

REM Denials Detail Report									
* Click blue arrow above to go back to the parent report									
Total Number of Records Returned: 1									
Client First Name	Client Last Name	Client ID	MA#	Denial ODF Date	Denial Reason	Specify Other	MCO	Specify MCO Other	Name of the user who submitted the Denial ODF
Charlie	Remy	100W90CJM0210	78787878988	2/15/2020	Insufficient documentation of a REM diagnosis	N/A	None	N/A	MDH REM Administrator1

Figure 377-REM Denials Detail Report

9. The report can be exported to the local hard drive. To do this, click on the **Save icon** available just below the region where search criteria was entered. A list of formats for saving the report is provided.
 - Select the desired format. A new file with the contents of the report will be generated which the user can save on the computer.

Start Date (mm/dd/yyyy)* 1/19/2020 12:00:00 AM End Date (mm/dd/yyyy)* 2/19/2020 12:00:00 AM

Reasons for Denial* Certified for Medicaid for 6 months

Date Created: 2/19/2020 11:18:06 AM

Search Criteria:

Start Date: 1/19/2020

End Date: 2/19/2020

Export Options:

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

Figure 378-REM Denials Report-Download

22.7 REM Enrollee Report

This report allows authorized users to view a list of Clients enrolled in REM by Jurisdiction of Assigned CMA during a selected date range. This report displays the Client Enrollment and Disenrollment Date, Assigned CMA Agency, and Staff details.

22.7.1 Primary Actors

DEPARTMENT	ROLES
MDH	MDH REM Administrator

Table 48-REM Enrollee Report - Primary Actors

22.7.2 View REM Enrollee Report

1. Select the **Reports** tab.
2. Choose the **REM Reports** in category.
3. Click **Filter** to see the list of REM Reports.
4. To view the **REM Enrollee Report**, click the **View** hyperlink.



Figure 379-REM Reports-REM Enrollee Report-View

5. Select the input parameters for the search criteria in the following fields:
 - a. Start Date
 - b. End Date
 - c. Jurisdiction
 - d. REM CMA

Start Date (mm/dd/yyyy)	<input type="text" value="1/19/2020 12:00:00 AM"/>	End Date (mm/dd/yyyy)	<input type="text" value="2/19/2020 12:00:00 AM"/>	<input type="button" value="View Report"/>
Jurisdiction	<input type="text" value="Allegany, Anne Arundel, Baltim"/>	REM CMA	<input type="text" value="MDH, REM 2, REM Agency, THE"/>	

Figure 380-REM Enrollee Report – Search Panel

Start Date (mm/dd/yyyy)	<input type="text" value="1/19/2020 12:00:00 AM"/>	End Date (mm/dd/yyyy)	<input type="text" value="2/19/2020 12:00:00 AM"/>
-------------------------	--	-----------------------	--

Figure 381-REM Enrollee Report – Search Panel-Date

Figure 382-REM Enrollee Report – Search Panel-Jurisdiction

- After selecting search criteria, click **View Report**. Results matching the search criteria are displayed.

Figure 383-REM Enrollee Report – Search Panel-View Report

- The **REM Enrollee Report** will display. The user can click on the **Client ID hyperlink** to view the Client Summary in LTSSMaryland. The report table can be sorted by selecting arrows next to any column name.

REM Enrollee Report

Search Criteria:
 Start Date: 1/19/2020
 End Date: 2/19/2020
 REM CMA: MDH; REM 2; REM Agency; THE COORDINATING CENTER
 Jurisdiction: Allegany; Anne Arundel; Baltimore; Baltimore City; Calvert; Caroline; Carroll; Cecil; Charles; Dorchester; Frederick; Garrett; Harford; Howard; Kent; Montgomery; Other; Prince George's; Queen Anne's; Somerset; St. Mary's; Talbot; Washington; Wicomico; Worcester

Report Date: 02/19/2020
Total Number of Records Returned: 23

First Name	Last Name	Client ID	MA#	REM Enrollment Date	REM Disenrollment Date	Jurisdiction	Assigned REM CMA Agency	Assigned REM CMA Case Manager	REM CMA Case Manager Supervisor
Blaze	Stevens	45596P8LBYV9120	N/A	1/30/2020	N/A	Baltimore City	THE COORDINATING CENTER	CMA REM Case Manager2	CMA REM Supervisor 1
Celinda	UATClient	10099EYECXD6121	N/A	1/30/2020	N/A	Queen Anne's	THE COORDINATING CENTER	CMA REM Case Manager2	CMA REM Supervisor 1
Chris	Barbara	23291UGHCXY9100	3454334554	2/14/2020	N/A	Baltimore	THE COORDINATING CENTER	CMA REM Case Manager1	CMA REM Supervisor 1
Crystal	UATClient	214929WRCHUB120	N/A	1/30/2020	N/A	Anne Arundel	THE COORDINATING CENTER	CMA REM Case Manager2	CMA REM Supervisor 1

Figure 384-REM Enrollee Report

8. The report can be exported to the local hard drive. To do this, click on the **Save icon** available just below the region where search criteria was entered. A list of formats for saving the report is provided.
 - Select the desired format. A new file with the contents of the report will be generated which the user can save on the computer.

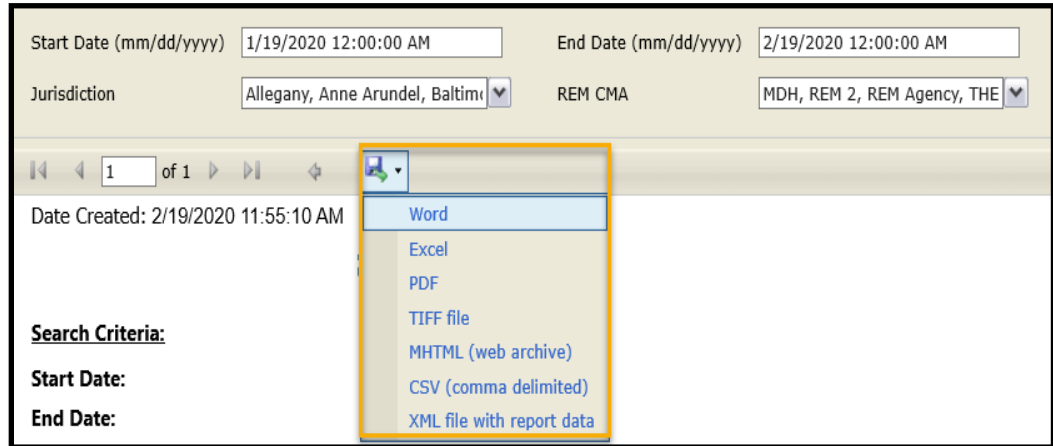


Figure 385-REM Enrollee Report-Download

22.8 REM Enrollment Timeline Report

This report allows authorized users to view a list of Clients in various REM statuses based on the current system date:

- REM Intake form In Progress
- Clients in Pending Nurse 1 Review
- Clients in Pending Nurse 2 Review
- Clients Pending Additional Medical Information
- Clients Pending Physician Advisor
- Clients on Hold
- Clients Approved for Enrollment
- Clients Denied for Enrollment
- Clients Pending Consent
- Clients Pending Service Coordination
- Clients Pending Case Manager Assignment

22.8.1 Primary Actors

DEPARTMENT	ROLES
MDH	MDH REM Administrator, MDH REM Intake Nurse, MDH REM Intake Specialist

Table 49-REM Enrollment Timeline Report - Primary Actors

22.8.2 View REM Enrollment Timeline Report

1. Select the **Reports** tab.
2. Choose the **REM Reports** in category.
3. Click **Filter** to see the list of REM Reports.
4. To view the **REM Enrollment Timeline Report**, click the **View** hyperlink.



Figure 386-REM Reports-REM Enrollment Timeline Report-View

5. Upon selecting the hyperlink, the **REM Enrollment Timeline - Summary Report** will display. To view the displayed results for each Status in the **“Count”** column, **click** the corresponding numeric hyperlink. (Refer to *“REM Enrollment Timeline Report – Detailed”* section)

Status	Count
REM Intake form In-Progress	44
Clients in Pending Nurse 1 Review	10
Clients in Pending Nurse 2 Review	5
Clients Pending Additional Information	7
Clients Pending Medical Advisor	5
Clients on Hold	1
Clients Approved for Enrollment	3
Clients Denied for Enrollment	4
Clients Pending Consent	0
Clients Pending Service Coordination	30
Clients Pending Case Manager Assignment	45

Figure 387-REM Enrollment Timeline Report

- The **REM Enrollment Timeline - Detail Report** will display. The user can click on the **Client ID hyperlink** to view the Client Summary in LTSSMaryland. The report table can be sorted by selecting arrows next to any column name.

REM Enrollment Timeline - Detail Report

* Click blue arrow above to go back to the parent report

Search Criteria:
 Status : In Progress
 Criteria For Overdue : More Than 3 Day(s)
 Report Date : 02/19/2020
 Total Number of Records Returned : 44

First Name	Last Name	Client ID	MA#	Status	# Of Days in Status	Criteria for OverDue	Assigned REM CMA	Assigned REM CMA Supervisor	Assigned REM CMA Case Manager
REM_CaseClosureAlert1	Test	770070ER000210	13000070000	In Progress	58	More Than 3 day(s)	N/A	N/A	N/A
REMSCF_SubToCMA	Test	770009ER040210	13815400009	In Progress	57	More Than 3 day(s)	N/A	N/A	N/A
REMAgencyAssignment_Rule3	Test	773002ER080200	N/A	In Progress	55	More Than 3 day(s)	N/A	N/A	N/A
AssignmentExp_user1	Test	77000HSA000200	N/A	In Progress	33	More Than 3 day(s)	N/A	N/A	N/A

Figure 388-REM Enrollment Timeline Detail Report

- The report can be exported to the local hard drive. To do this, click on the **Save icon** available just below the region where search criteria was entered. A list of formats for saving the report is provided.
 - Select the desired format. A new file with the contents of the report will be generated which the user can save on the computer.

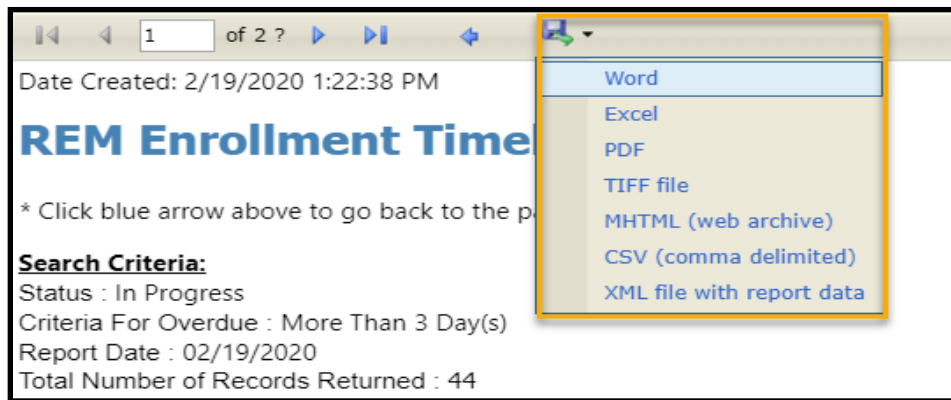


Figure 389-REM Enrollment Timeline Report-Download

22.9 REM Enrollment Timeline Report - Detailed

INFORMATION FOR EACH STATUS IS DEFINED AS FOLLOWS:	
REM Intake Form In-Progress	This will display the number of Clients whose REM Intake Referral form status is In-Progress as of the system date <i>and</i> it has been in that status for <i>more than</i> three (3) days.
Clients in Pending Nurse Review 1	This will display the number of Clients whose REM Intake Referral form is in status Pending Nurse Review 1 as of the system date <i>and</i> it has been in that status for <i>more than</i> five (5) days.
Clients in Pending Nurse Review 2	This will display the number of Clients whose REM Intake Referral form is in status Pending Nurse Review 2 as of the

INFORMATION FOR EACH STATUS IS DEFINED AS FOLLOWS:	
	system date <i>and</i> it has been in that status for <i>more than</i> five (5) days.
Clients Pending Additional Medical Information	This will display the number of Clients whose REM Intake Referral is in status Pending Additional Medical Information as of the system date <i>and</i> it has been in that status for <i>more than</i> seven (7) days.
Clients Pending Medical Advisor	This will display the number of Clients whose REM Intake Referral form in status Pending Medical Advisor as of the system date <i>and</i> it has been in that status for <i>more than</i> 14 days.
Clients On Hold	This will display the number of Clients whose REM Intake Referral form has been in status On Hold as of the system date <i>and</i> it has been in that status for <i>more than</i> 14 days.
Clients Approved for Enrollment	This will display the number of Clients whose REM Intake Referral form status changed to Approved for Enrollment and was in the <i>prior</i> status for more than 5 days.
Clients Denied for Enrollment	This will display the number of Clients whose REM Intake Referral form status changed to Denied for Enrollment <i>and</i> was in the <i>prior</i> status for more than five (5) days.
Clients Pending Consent	This will display the number of Clients whose REM Consent form has been in status In Progress for <i>more than</i> 42 days.
Clients Pending Service Coordination	This will display the number of Clients whose Service Coordination form is <i>not</i> in any final status (Completed or Discarded) for <i>more than</i> 14 days.
Clients Pending Case Manager Assignment	This will display the number of Clients who had a REM CMA assigned but has been awaiting CMA CM assignment for <i>more than</i> one (1) day.

Figure 390-REM Status Overview: REM Enrollment Timeline Report

22.10 REM Intake Referral Statistics Report

This report allows authorized users to view intake information for a list of Clients enrolled in REM during a selected date range. This report has two (2) report types:

- **REM Intake Status** – Displays the status of Client progress in REM.
 - This report runs based on the current system date
- **REM Intake Production Statistics** – Displays the status of Client REM Intake and ODF.
 - This report runs based on the date range entered.

This report has a Summary Report. A Details Report can be accessed by clicking on any of the hyperlinked numbers.

22.10.1 Primary Actors

DEPARTMENT	ROLES
MDH	MDH REM Administrator

Table 50-REM Intake Referral Statistic Report - Primary Actors

22.10.2 View REM Intake Referral Statistics Report

1. Select the **Reports** tab.
2. Choose the **REM Reports** in category.
3. Click **Filter** to see the list of REM Reports.
4. To view the **REM Intake Referral Statistics Report**, click the View hyperlink.



Figure 391-REM Reports-REM Intake Referral Statistics Report-View

5. The user has the option to view two (2) separate report types:
 - a. **REM Intake Status**
 - NOTE:** REM Intake Status will run as of the system date
 - b. **REM Intake Production Statistics**

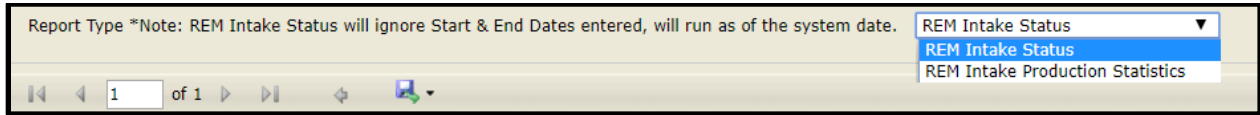


Figure 392- REM Intake Referral Statistics Report – Search Panel

6. Select the input parameters for the search criteria in the following fields:
 - a. Start Date
 - b. End Date
 - c. Report Type
7. After selecting search criteria, click **View Report**. Results matching the search criteria are displayed.

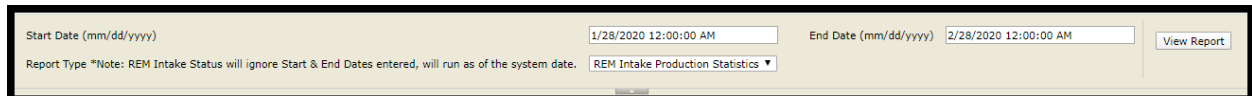


Figure 393- REM Intake Referral Statistics Report – Search Panel

8. If the user selected the **REM Intake Status Report**, the following report will display.

Form Type	Total
REM Intake Received	403
REM Reconsideration Received	5
Total REM Intake/Reconsideration Received	408
REM Intake Approved	305
REM Reconsideration Approved	2
Total REM Intake/Reconsideration Approved	307
REM Intake Denied	22
REM Reconsideration Denied	3
Total REM Intake/Reconsideration Denied	25
REM Intake Co-ordination	76
REM Service Co-ordination	42
REM Declined	19
REM Enrolled	203
REM Disenrolled	54
Net Enrolled	149

Figure 394- REM Intake Status Report

9. The report can be exported to the local hard drive. To do this, click on the **Save icon** available just below the region where search criteria was entered. A list of formats for saving the report is provided.
 - Select the desired format. A new file with the contents of the report will be generated which the user can save on the computer.

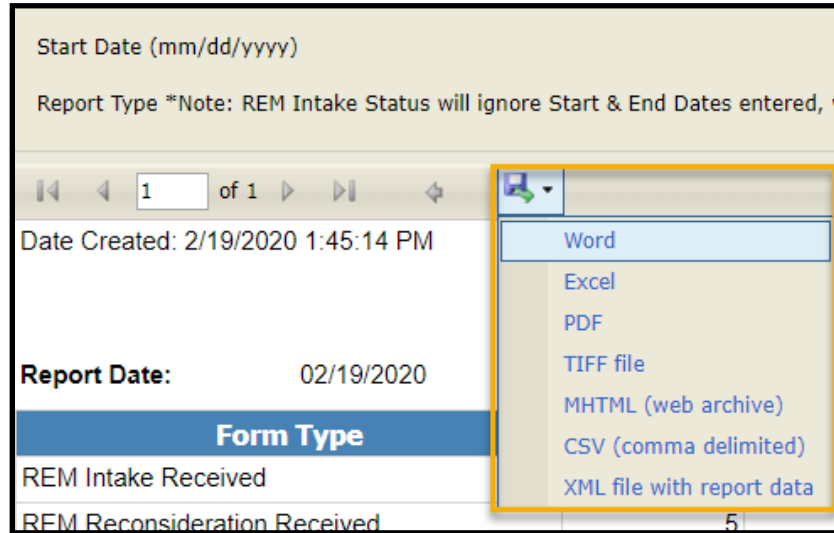


Figure 395-REM Intake Status-Download

10. If the user selected the **REM Intake Production Statistics Report**, the following report will display.
11. Six status columns are displayed:
 - **REM Intake Received**
 - **REM Intake Approved**
 - **REM Intake Denied**
 - **REM Intake Declined**
 - **REM Enrolled**
 - **REM Disenrolled**

To view detailed results for each status, **click** the corresponding numeric hyperlink.

REM Intake Production Statistics						
Search Criteria:						
Start Date:	1/19/2020					
End Date:	2/19/2020					
Report Date:	02/19/2020					
REM Intake Received	REM Intake Approved	REM Intake Denied	REM Intake Declined	REM Enrolled	REM Disenrolled	Net Enrolled
40	34	1	0	26	5	21

Figure 396-REM Intake Production Statistics Report

- The **REM Intake Production Statistics Detail Report** will display. The user can click on the **Client ID hyperlink** to view the Client Summary in LTSSMaryland. The report table can be sorted by selecting arrows next to any column name.

First Name	Last Name	Client ID	MA#	Intake Decision Date	Intake Decision	Denial Date	Denial Reason	Decline Date	REM Begin Date	REM End Date	Disenrollment Reason
ODF_Alert1	Test	2680000DO030220	14776300000	2/14/2020	Approved	N/A		N/A	8/19/2019	6/27/2021	Participant deceased
SCF_Regression	Jay	2870046CS550220	45454545600	2/17/2020	Approved	N/A		N/A	10/1/2019	8/26/2055	
REM	UMCRR	21692R8ERP78120	12345678985	1/26/2020	Approved	N/A		N/A	1/26/2019	1/25/2047	
Regression_jay10	Test	2170970ER880220	78787878780	1/27/2020	Approved	N/A		N/A	1/27/2020	1/26/2030	
REM	UMCRR1	2489953ER485720	45685236874	1/28/2020	Approved	N/A		N/A	1/29/2020	1/27/2021	

Figure 397-REM Intake Production Statistics Detail Report

- The report can be exported to the local hard drive. To do this, click on the **Save icon** available just below the region where search criteria was entered. A list of formats for saving the report is provided.
 - Select the desired format. A new file with the contents of the report will be generated which the user can save on the computer.

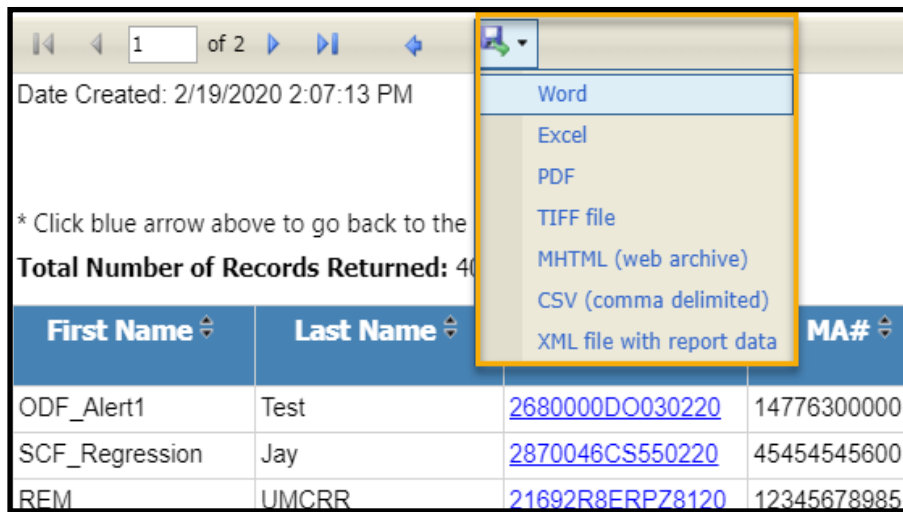


Figure 398- Intake Production Statistics Detail Report-Download

22.11 REM LOC Report

This report allows authorized users to view a list of Clients who are enrolled in REM and either have *no* LOC during the date range entered, LOC *changed* during the date range entered, or all Clients with LOC for the date range entered.

This report has three (3) report types:

- Missing REM LOC
- REM LOC changed
- LOC report

22.11.1 Primary Actors

DEPARTMENT	ROLES
CMA	CMA REM Administrator, CMA REM Supervisor (For Clients assigned to the agency), CMA REM Case Manager (For their assigned Clients)
MDH	MDH REM Administrator

Table 51-REM LOC Reports - Primary Actors

22.11.2 View REM LOC Report

1. Select the **Reports** tab.
2. Choose the **REM Reports** in category.
3. Click **Filter** to see the list of REM Reports.
4. To view the **REM LOC Report**, click the **View** hyperlink.



Figure 399-REM Reports-REM LOC-View

5. The user has the option to view three (3) separate report types:
 - a. **Missing REM LOC:** Display the list of Clients who do not have a REM LOC for the date range selected.
 - b. **REM LOC changed:** Display the list of Clients whose LOC changed for the date range selected.
 - c. **LOC Report:** Display the list of Clients who had a LOC in the date range selected.

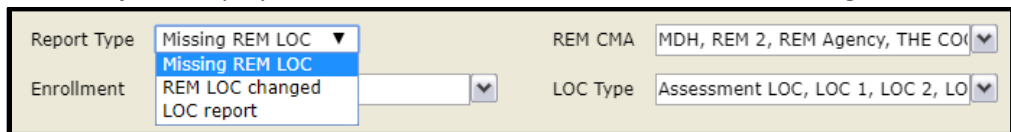


Figure 400-REM LOC-Report Type

6. Select the input parameters for the search criteria in the following fields:
 - a. Start Date
 - b. End Date
 - c. Report Type
 - d. REM CMA
 - e. Enrollment
 - f. LOC Type

Start Date: 1/19/2020 12:00:00 AM End Date: 2/19/2020 12:00:00 AM View Report

Report Type: Missing REM LOC REM CMA: MDH, REM 2, REM Agency, THE CO

Enrollment: Active, InActive LOC Type: Assessment LOC, LOC 1, LOC 2, LO

Figure 401-REM LOC Report – Search Panel

Start Date (mm/dd/yyyy): 1/19/2020 12:00:00 AM End Date (mm/dd/yyyy): 2/19/2020 12:00:00 AM

Figure 402-REM LOC Report – Search Panel-Date

Start Date: 1/19/2020 12:00:00 AM

Report Type: <Select a Value> (dropdown menu open)

- <Select a Value>
- Missing REM LOC
- REM LOC changed
- LOC report

Enrollment: (dropdown menu)

Figure 403-REM LOC Report – Search Panel-Report Type

End Date: 2/19/2020 12:00:00 AM

REM CMA: MDH, REM 2, REM Agency, THE CO (dropdown menu)

LOC Type: (dropdown menu open)

- (Select All)
- MDH
- REM 2
- REM Agency
- THE COORDINATING CENTER
- Unassigned

Figure 404-REM LOC Report – Search Panel-REM CMA

Start Date: 1/19/2020 12:00:00 AM

Report Type: Missing REM LOC

Enrollment: Active, InActive (dropdown menu open)

- (Select All)
- Active
- InActive

Figure 405-REM LOC Report – Search Panel-Enrollment

Figure 406-REM LOC Report – Search Panel-LOC Type

- After selecting search criteria, click **View Report**. Results matching the search criteria are displayed.

Figure 407-REM LOC Report– Search Panel-View Report

- The **REM LOC Report** will display. The user can click on the **Client ID hyperlink** to view the Client Summary in LTSSMaryland. The report table can be sorted by selecting arrows next to any column name.

REM LOC Report

Search Criteria:
 Start Date: 1/4/2020
 End Date: 2/18/2020
 Report Type: Missing REM LOC
 REM CMA: MDH, REM 2, REM Agency, THE COORDINATING CENTER, Unassigned
 Enrollment: Active, InActive
 LOC Type: Assessment LOC , LOC 1, LOC 2, LOC 3
 Report Date: 02/19/2020
 Total Records: 80

First Name	Last Name	Client Id	MAP	Assigned REM CMA Agency	REM CMA Case Manager Supervisor	Assigned REM CMA Case Manager	LOC Type
313320_User1	Test	11500013098120	31332000000	N/A	N/A	N/A	LOC 1
Adam	Remmy	30388080L109121	N/A	THE COORDINATING CENTER	CMA REM Supervisor 1	CMA REM Case Manager3	Assessment LOC
Adi_SCF3	Test	264001304230200	12312312345	THE COORDINATING CENTER	CMA REM Supervisor 1	CMA REM Case Manager2	LOC 2
Alvin Assessment123	REAssessment	25700950C740220	33824600000	THE COORDINATING CENTER	CMA REM Supervisor 1	CMA REM Case Manager2	LOC 2

Figure 408-REM Report

9. The report can be exported to the local hard drive. To do this, click on the **Save icon** available just below the region where search criteria was entered. A list of formats for saving the report is provided.
 - Select the desired format. A new file with the contents of the report will be generated which the user can save on the computer.

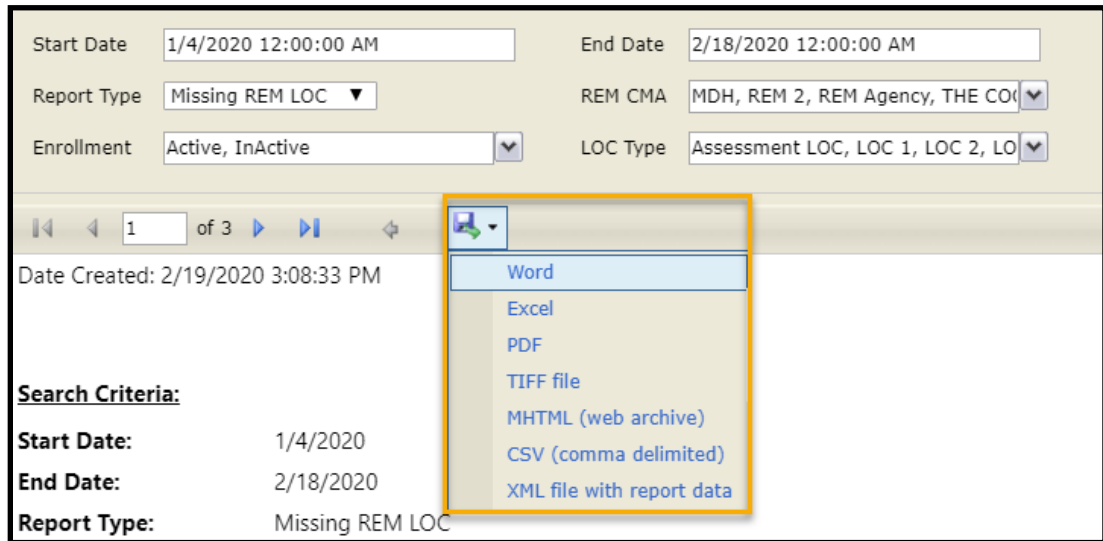


Figure 409-REM LOC Report-Download

22.12 REM Provider Relations Activity Report

This report allows authorized users to view REM Activities added by the Provider Relations Rep. This report will display the list of Clients and the Activity based on the selected date range. This report will pull a list of Clients where the Activity was dated during the date range and the Activity is as follows:

- Activity: Phone or Phone Attempt
- With: Provider Relation Rep
- Type: None

22.12.1 Primary Actors

DEPARTMENT	ROLES
CMA	CMA REM Administrator, CMA REM Supervisor (For Clients assigned to the agency), CMA REM Case Manager (For their assigned Clients)
MDH	MDH REM Administrator, REM Intake Nurse, REM Intake Specialist

Table 52-REM Provider Relations Activity Report - Primary Actors

22.12.2 View REM Provider Relations Activity Report

1. Select the **Reports** tab.
2. Choose the **REM Reports** in category.
3. Click **Filter** to see the list of REM Reports.
4. To view the **REM Provider Relations Activity Report**, click the **View** hyperlink.



Figure 410-REM Reports-REM Provider Relations Activity Report-View

5. Select the input parameters for the search criteria in the following fields:
 - a. Start Date
 - b. End Date
 - c. REM CMA
 - d. Case Manager
 - e. Added By

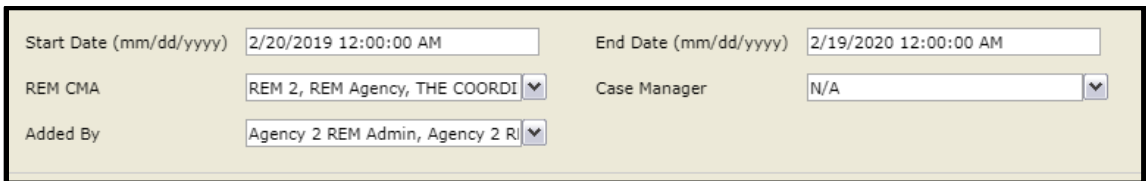


Figure 411-REM Provider Relations Activity Report– Search Panel

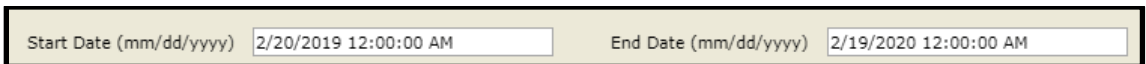


Figure 412-REM Provider Relations Activity Report – Search Panel-Date

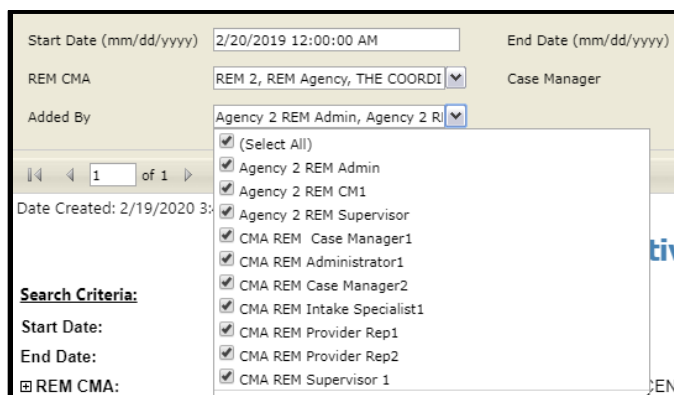


Figure 413-REM Provider Relations Activity Report – Search Panel-Added By

6. After selecting search criteria, click **View Report**. Results matching the search criteria are displayed.

Figure 414-REM Provider Relations Activity Report – Search Panel-View Report

- The **REM Provider Relations Activity Report** will display. The user can click on the Client ID hyperlink to view the Client Summary in LTSSMaryland. The report table can be sorted by selecting arrows next to any column name.

REM Provider Relations Activity Report

Search Criteria:
 Start Date: 2/20/2019
 End Date: 2/19/2020
 REM CMA: REM 2, REM Agency, THE COORDINATING CENTER
 Case Manager: N/A
 Added By: Agency 2 REM Admin, Agency 2 REM Supervisor, CMA REM Case Manager1, CMA REM Administrator1, CMA REM Case Manager2, CMA REM Intake Specialist1, CMA REM Provider Rep1, CMA REM Provider Rep2, CMA REM Supervisor 1
 Report Date: 02/19/2020
 Total Number of Records Returned: 13

First Name	Last Name	Client ID	MA Number	Activity	Activity With	Activity Type	Description	Added By	Activity Date	Duration	Assigned REM CMA	REM CMA Case- Manager Supervisor	REM CMA Case- Manager
REM	Overview1	22501UGER8D0200	N/A	Phone	Provider Relations Rep	None	t	CMA REM Case Manager2	12/03/2019	03:00	THE COORDINATING CENTER	CMA REM Supervisor 1	CMA REM Case Manager3
				Phone Attempt	Provider Relations Rep	None	t	CMA REM Provider Rep2	12/11/2019	01:30	THE COORDINATING CENTER	CMA REM Supervisor 1	CMA REM Case Manager3
REM	Overview2	22502L9ERU0200	N/A	Phone Attempt	Provider Relations Rep	None	d	Agency 2 REM Supervisor	12/02/2019	N/A	THE COORDINATING CENTER	CMA REM Supervisor 1	CMA REM Case Manager1
				Phone	Provider Relations Rep	None	rg	Agency 2 REM Supervisor	12/16/2019	N/A	THE COORDINATING CENTER	CMA REM Supervisor 1	CMA REM Case Manager1
				Phone Attempt	Provider Relations Rep	None	fe	Agency 2 REM CMA1	12/16/2019	N/A	THE COORDINATING CENTER	CMA REM Supervisor 1	CMA REM Case Manager1
Brenda BI REM	REM	1949957RB628100	09823456712	Phone Attempt	Provider Relations Rep	None	f	CMA REM Case Manager1	10/17/2019	N/A	THE COORDINATING CENTER	CMA REM Supervisor 1	CMA REM Case Manager1
				Phone	Provider Relations Rep	None	i	CMA REM Case Manager1	12/12/2019	N/A	THE COORDINATING CENTER	CMA REM Supervisor 1	CMA REM Case Manager1
				Phone	Provider Relations Rep	None	ouh	CMA REM Intake Specialist1	12/16/2019	N/A	THE COORDINATING CENTER	CMA REM Supervisor 1	CMA REM Case Manager1
				Phone Attempt	Provider Relations Rep	None	t	CMA REM Administrator1	12/16/2019	N/A	THE COORDINATING CENTER	CMA REM Supervisor 1	CMA REM Case Manager1
				Phone Attempt	Provider Relations Rep	None	i	CMA REM Supervisor 1	12/16/2019	N/A	THE COORDINATING CENTER	CMA REM Supervisor 1	CMA REM Case Manager1

Figure 415-REM Provider Relations Activity Report

- The report can be exported to the local hard drive. To do this, click on the **Save icon** available just below the region where search criteria was entered. A list of formats for saving the report is provided.
 - Select the desired format. A new file with the contents of the report will be generated which the user can save on the computer.

Figure 416-REM Provider Relations Activity Report- Download

22.13 REM Referral Source Report

This report allows authorized users to view Clients with the specified referral source during the selected date range. Information from REM Intake Referral forms received during the date range will display.

22.13.1 Primary Actors

DEPARTMENT	ROLES
MDH	MDH REM Administrator

Table 53-REM Referral Source Report - Primary Actors

22.13.2 View REM Referral Source Report

1. Select the **Reports** tab.
2. Choose the **REM Reports** in category.
3. Click **Filter** to see the list of REM Reports.
4. To view the **REM Referral Source Report**, click the **View** hyperlink.



Figure 417-REM Reports-REM Referral Source Report-View

5. Select the input parameters for the search criteria in the following fields:
 - a. Start Date
 - b. End Date
 - c. Referral Source Type
 - d. MCO

Start Date	<input type="text" value="2/19/2020 12:00:00 AM"/>	End Date	<input type="text" value="2/19/2020 12:00:00 AM"/>
Referral Source Type	<input type="text" value="MCO, Clinic, Case Manager, Hospit"/>	MCO	<input type="text" value="N/A, Aetna Better Health, AMERIG"/>

Figure 418-REM Referral Source Report – Search Panel

Start Date	<input type="text" value="2/19/2020 12:00:00 AM"/>	End Date	<input type="text" value="2/19/2020 12:00:00 AM"/>
------------	--	----------	--

Figure 419-REM Referral Source Report – Search Panel-Date

Start Date: 2/19/2020 12:00:00 AM

Referral Source Type: MCO, Clinic, Case Manager, Hospit

1 of 1

Date Created: 2/19/2020

Search Criteria:

- (Select All)
- MCO
- Clinic
- Case Manager
- Hospital
- Physician
- Self/Family
- Other

Figure 420-REM Referral Source Report – Search Panel-Referral Source Type

End Date: 2/19/2020 12:00:00 AM

MCO: N/A, Aetna Better Health, AMERIG

- (Select All)
- N/A
- Aetna Better Health
- AMERIGROUP Community Care
- Jai Medical Systems
- Kaiser Permanente
- Maryland Physicians Care
- MedStar Family Choice
- Priority Partners
- UnitedHealthcare

Figure 421-REM Referral Source Report – Search Panel-MCO

6. After selecting search criteria, click **View Report**. Results matching the search criteria are displayed.

Start Date: 2/19/2020 12:00:00 AM End Date: 2/19/2020 12:00:00 AM

Referral Source Type: MCO, Clinic, Case Manager, Hospit MCO: N/A, Aetna Better Health, AMERIG

View Report

Figure 422-REM Referral Source Report – Search Panel-View Report

- To view the Details Report for each referral type, **click** the corresponding numeric hyperlink from the “**Number of Referrals**” column.

REM Referral Source Summary Report

Search Criteria:
Start Date: 2/19/2020
End Date: 2/19/2020
Referral Source Type: MCO; Clinic; Case Manager; Hospital; Physician; Self/Family; Other
MCO: N/A; Aetna Better Health; AMERIGROUP Community Care; Jai Medical Systems; Kaiser Permanent; Maryland Physicians Care; MedStar Family Choice; Priority Partners; UnitedHealthcare; University of Maryland Health Partners; MCO Other
Report Date: 02/19/2020

Referral Source Type	MCO Name	Number of Referrals
Total # of Referrals:		3
Case Manager		1
MCO	Subtotal for MCO:	2
	Aetna Better Health	2

Figure 423-REM Referral Source Summary Report

- Upon clicking on the hyperlink, the **REM Referral Source Detail Report** will display. The user can click on the **Client ID hyperlink** to view the Client Summary in LTSSMaryland. The user can click on the **Referral Date hyperlink** to view the Client REM Intake Summary in LTSSMaryland. The report table can be sorted by selecting arrows next to any column name.

REM Referral Source Detail Report

* Click blue arrow above to go back to the parent report
 Total Number of Records Returned: 2

First Name	Last Name	Client ID	DOB	Current MA Number	REM Form Number	REM Qualifying Diagnosis	Referral Date	Referral Source Type	MCO Name	MCO Other Name	REM Intake Status	REM Enrollment Status
Assessment_Sec0	Test	22001456321212	2/19/2019	22283280001	REM016961	B20 - Human Immunodeficiency virus (HIV) disease	2/19/2020	MCO	Aetna Better Health	N/A	Approved	N/A
Assessment_Sec01	Test	22001456331212	2/18/2019		REM016962	B20 - Human Immunodeficiency virus (HIV) disease	2/18/2019	MCO	Aetna Better Health	N/A	Approved	N/A

Figure 424-REM Referral Source Detail Report

- The report can be exported to the local hard drive. To do this, click on the **Save icon** available just below the region where search criteria was entered. A list of formats for saving the report is provided.
 - Select the desired format. A new file with the contents of the report will be generated which the user can save on the computer.

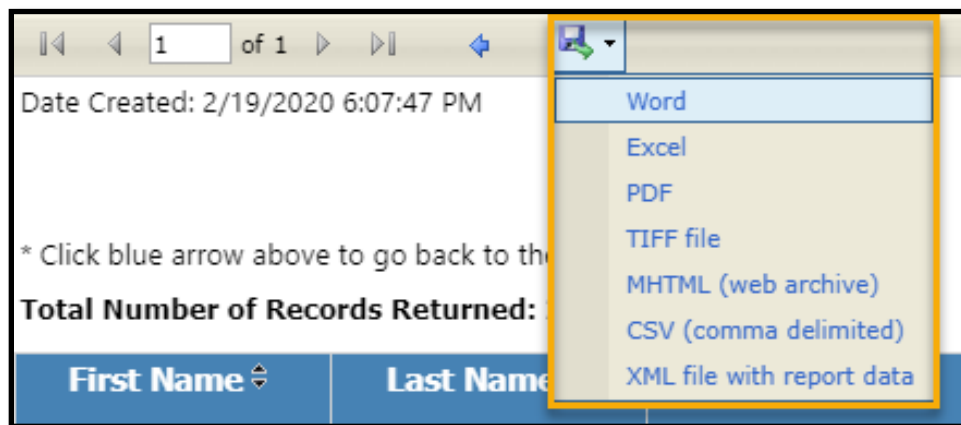


Figure 425-REM Referral Source Report-Download

22.14 REM Transitioning Youth Report

This report allows authorized users to view Clients who are 20 years old or will turn 20 years old in the current month.

22.14.1 Primary Actors

DEPARTMENT	ROLES
CMA	CMA REM Administrator
MDH	MDH REM Administrator

Table 54-REM Transitioning Youth Report

22.14.2 View REM Transitioning Youth Report

1. Select the **Reports** tab.
2. Choose the **REM Reports** in category.
3. Click **Filter** to see the list of REM Reports.
4. To view the **REM Transitioning Youth Report**, click the **View** hyperlink.



Figure 426-REM Reports-REM Transitioning Youth Report-View

5. Upon clicking on the hyperlink, the **REM Transitioning Youth Report** will display. The user can click on the **Client ID hyperlink** to view the Client Summary in LTSSMaryland. The report table can be sorted by selecting arrows next to any column name.

REM Transitioning Youth Report										
Search Criteria:										
Report Date : 02/20/2020										
Total Number of Records Returned : 5										
First Name :	Last Name :	Client ID :	MA# :	Date of Birth :	Age :	# of Months till 21 :	Jurisdiction/County :	REM Qualifying Diagnosis :	Age Out Date :	
Filter_User1	Test	144000HPF9X0210	14521236511	11/11/1999	20	9	Baltimore	B20 - Human immunodeficiency virus [HIV] disease	4/9/2021	
Test11	REMReport	20898001049121	20030400055	11/11/1999	20	9	Garrett	E792 - Myoadenylate deaminase deficiency	10/28/2063	
REMCMA Report	testing	1630919AL411200	N/A	11/11/1999	20	9	Other	G7109 - Other specified muscular dystrophies	6/2/2084	
Preuat9	Feedback	21401FRP150201	N/A	11/11/1999	20	9	Baltimore	B20 - Human immunodeficiency virus [HIV] disease	11/3/2022	
Test20	REMReport	1180035ET400201	38495034567	11/11/1999	20	9	Frederick	Q060 - Amyelia	11/7/2065	

Figure 427-REM Transitioning Youth Report

6. The report can be exported to the local hard drive. To do this, click on the **Save icon** available just below the region where search criteria was entered. A list of formats for saving the report is provided.
 - Select the desired format. A new file with the contents of the report will be generated which the user can save on the computer.

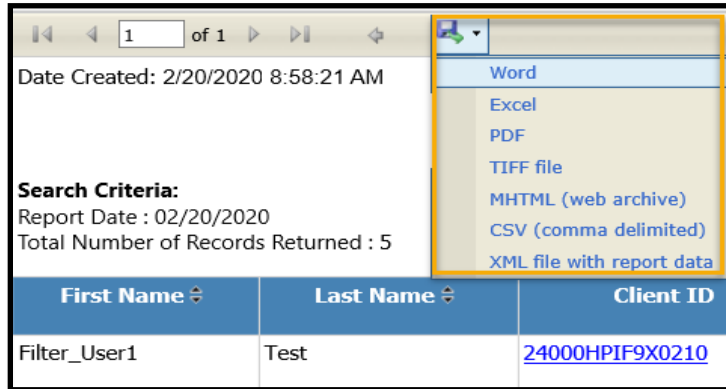


Figure 428-REM Transitioning Youth Report – Download

22.15 REM Unmet Minimum Contact and Reporting Requirements Report

This report allows authorized users to view a list of Clients whose minimum contact and reporting criteria were not met by the assigned REM Case Management Agency based on the selected date range and the Client LOC. The results are derived from documented Activities in the REM Activities module. The report can display:

- Missed Client Contact
- Missed Client Visit
- Missed PCP Contact
- Missed Examine Cost Data
- Missed Report Assessment
- Missed Report CMP

NOTE: This report will display the current month and previous month results only

22.15.1 Primary Actors

DEPARTMENT	ROLES
CMA	CMA REM Administrator, CMA REM Supervisor (For Clients assigned to the agency), CMA REM Case Manager (For their assigned Clients)
MDH	MDH REM Administrator

Table 55-REM Unmet Minimum Contact and Reporting Requirements Report

22.15.2 View REM Unmet Minimum Contact and Reporting Requirements Report

1. Select the **Reports** tab.
2. Choose the **REM Reports** in category.
3. Click **Filter** to see the list of REM Reports.
4. To view the **REM Unmet Minimum Contact and Reporting Requirements Report**, click the **View** hyperlink.



Figure 429-REM Reports-REM Unmet Minimum Contact and Reporting Requirements Report-View

5. Select the input parameters for the search criteria in the following fields:
 - a. Month Of
 - b. LOC Type
 - c. Activity
 - d. REM CMA
 - e. Case Manager
- Up to three (3) reports can display based on the search criteria.

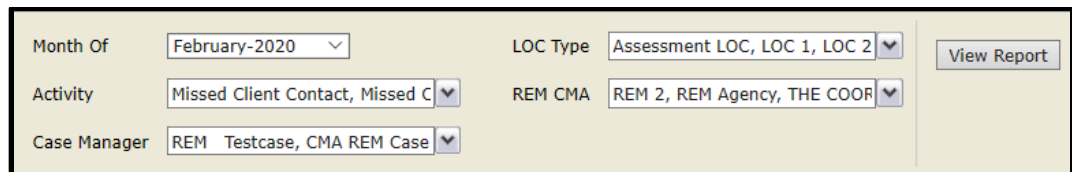


Figure 430-REM Unmet Minimum Contact and Reporting Requirements Report-Search Panel

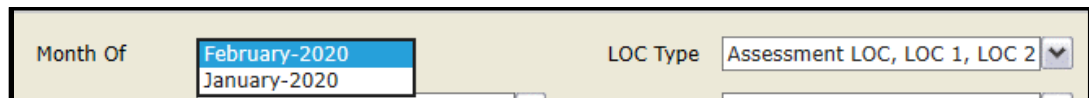


Figure 431- REM Unmet Minimum Contact and Reporting Requirements Report-Search Panel-Month Of

The screenshot shows a search panel with two main sections. The first section, labeled 'LOC Type', has a dropdown menu currently displaying 'Assessment LOC, LOC 1, LOC 2'. The second section, labeled 'REM CMA', has a dropdown menu that is open, showing a list of options with checkboxes: '(Select All)', 'Assessment LOC', 'LOC 1', 'LOC 2', and 'LOC 3'. All checkboxes in this list are checked.

Figure 432- REM Unmet Minimum Contact and Reporting Requirements Report - Search Panel-LOC Type

The screenshot shows a search panel with three main sections. The first section, 'Month Of', has a dropdown menu set to 'February-2020'. The second section, 'Activity', has a dropdown menu set to 'Missed Client Contact, Missed C'. The third section, 'Case Manager', has a dropdown menu that is open, showing a list of options with checkboxes: '(Select All)', 'Missed Client Contact', 'Missed Client Visit', 'Missed PCP Contact', 'Missed Examine Cost Data', 'Missed Report Assessment', and 'Missed Report CMP'. All checkboxes in this list are checked.

Figure 433- REM Unmet Minimum Contact and Reporting Requirements Report-Search Panel-Activity

The screenshot shows a search panel with three main sections. The first section, 'Month Of', has a dropdown menu set to 'February-2020'. The second section, 'Activity', has a dropdown menu set to 'Missed Client Contact, Missed C'. The third section, 'Case Manager', has a dropdown menu set to 'REM Testcase, CMA REM Case' and a list of options with checkboxes: '(Select All)', 'CMA REM Case Manager1', 'CMA REM Case Manager3', 'Agency 3 REM Case Manager 1', 'Agency 2 REM Case Manager 1', and 'Agency 2 Case Manager'. All checkboxes in this list are checked.

Figure 434- REM Unmet Minimum Contact and Reporting Requirements Report-Search Panel-Case Manager

- After selecting search criteria, click **View Report**. Results matching the search criteria are displayed.

Figure 435-REM Unmet Minimum Contact and Reporting Requirements Report-View Report

- Navigate to each next page by clicking on the **blue arrow** next to the page number.

REM Unmet minimum Contact and Reporting Requirements Report

Search Criteria:
Month Of: February-2020
LOC Type: Assessment LOC , LOC 1, LOC 2, LOC 3
Activity: Missed Client Contact, Missed Client Visit, Missed PCP Contact, Missed Examine Cost Data, Missed Report Assessment, Missed Report CMP
REM CMA: REM 2, REM Agency, THE COORDINATING CENTER
Case Manager: REM Testcase, CMA REM Case Manager2, Jay test, CMA REM Case Manager1, CMA REM Case Manager3, Agency 3 REM Case Manager 1, Agency 2 REM Case Manager 1, Agency 2 Case Manager
Report Date: 02/20/2020

Overall Summary

REM CMA Name	Total Clients with completed LOC	Total Flagged	Percentage Flagged	Total Not Flagged	Percentage Not Flagged
THE COORDINATING CENTER	2	2	100.00%	0	0.00%

Page 1 of 3

Figure 436-REM Unmet Minimum Contact and Reporting Requirements Report (Page 1)

- The user can click on the **Client ID hyperlink** to view the Client Summary in LTSSMaryland. The report table can be sorted by selecting arrows next to any column name.

REM Unmet minimum Contact and Reporting Requirements Report

Assessment LOC

Assessment LOC	# of Clients	Percentage
Total	1	100.0 %
Flagged	1	100.0 %

First Name	Last Name	Client ID	MA Number	Date Agency Assignment	Agency	Assigned REM CM	Client Letter	Client Phone	Client Phone Attempt	Client Email	Client Visit	Client Visit Attempt
ODF_Alert1	Test	1680000000000220	14778300000	2/12/2020	THE COORDINATING CENTER	CMA REM Case Manager2						

Page 2 of 3

Figure 437- REM Unmet Minimum Contact and Reporting Requirements Report (Page 2)

REM Unmet minimum Contact and Reporting Requirements Report

LOC 2

LOC 2	# of Clients	Percentage
Total	1	100.0 %
Flagged	1	100.0 %

First Name	Last Name	Client ID	MA Number	Date Agency Assignment	Agency	Assigned REM CM	Client Letter	Client Phone	Client Phone Attempt	Client Email	Client Visit	Client Visit Attempt
Michael	Scott	16356577M896110	23412334512	2/14/2020	THE COORDINATING CENTER	CMA REM Case Manager3						

Page 3 of 3

Figure 438- REM Unmet Minimum Contact and Reporting Requirements Report (Page 3)

9. The report can be exported to the local hard drive. To do this, click on the **Save icon** available just below the region where search criteria was entered. A list of formats for saving the report is provided.
 - Select the desired format. A new file with the contents of the report will be generated which the user can save on the computer.

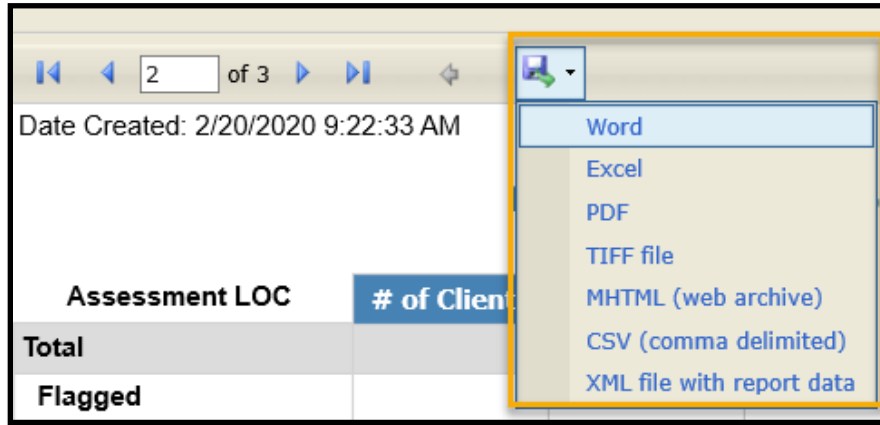


Figure 439- REM Unmet Minimum Contact and Reporting Requirements Report-Download

22.16 REM Waiver Transaction with Medicare Report

This report will provide a list of Clients who have an Active enrolled REM ODF and have an **active** Medicare span in MMIS.

NOTE: This report is most often used to identify Clients who need a Waiver Transaction Form completed to reactivate a REM span in MMIS.

22.16.1 Primary Actors

DEPARTMENT	ROLES
MDH	MDH REM Administrator

Table 56-REM Waiver Transaction with Medicare Report

22.16.2 View REM Waiver Transaction with Medicare Report

1. Select the **Reports** tab.
2. Choose the **REM Reports** in category.
3. Click **Filter** to see the list of REM Reports.
4. To view the **REM Waiver Transaction with Medicare Report**, click the **View** hyperlink.



Figure 440-REM Reports-REM Waiver Transaction with Medicare Report - View

5. Select the input parameters for the search criteria in the following fields:
 - a. Start Date
 - b. End Date

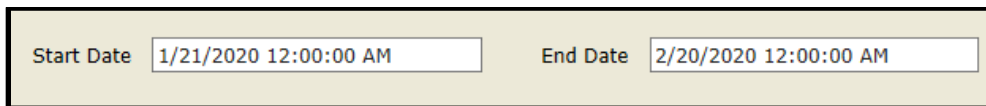


Figure 441-REM Waiver Transaction with Medicare Report-Search Panel-Date

6. After selecting search criteria, click **View Report**. Results matching the search criteria are displayed.



Figure 442 REM Waiver Transaction with Medicare Report-Search Panel-View Report

10. The **REM Waiver Transaction for Medicare Report** will display. The user can click on the **Client ID hyperlink** to view the Client Summary in LTSSMaryland. The report table can be sorted by selecting arrows next to any column name.

REM Waiver Transaction with Medicare Report											
Search Criteria:											
Start Date:	1/21/2020										
End Date:	2/20/2020										
Report Date:	02/20/2020										
First Name	Last Name	Client ID	MA #	Medicare ID	Medicare Part	Medicare Begin Date	Medicare End Date	Special Program Code (SPC)	REM SPC Start Date	REM SPC End Date	Assigned Agency
Robin	Banks	21094409221201	8484959521	8484959521Z	A	8/1/2019	5/31/2020	N/A	N/A	N/A	THE COORDINATING CENTER

Figure 443- REM Waiver Transaction with Medicare Report

11. The report can be exported to the local hard drive. To do this, click on the **Save icon** available just below the region where search criteria was entered. A list of formats for saving the report is provided.
 - Select the desired format. A new file with the contents of the report will be generated which the user can save on the computer

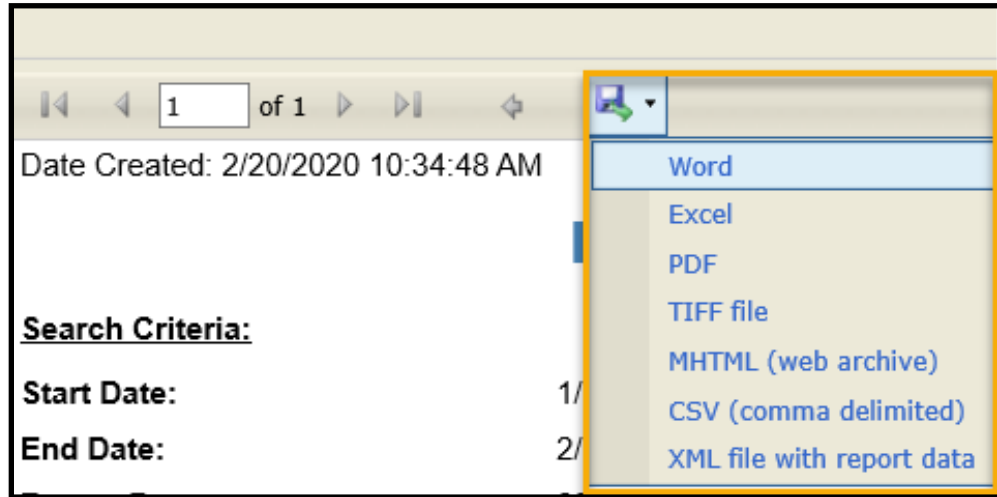


Figure 444- REM Waiver Transaction with Medicare Report-Download

23 REM PCP Selection Form

A REM PCP Selection Form is added by MDH REM when a client does not have a Primary Care Provider (PCP) at the time the case is assigned to the CMA. The form must be completed by the assigned REM CM once the client’s PCP has been identified.

MDH REM Team initiates this form for a client and the assigned Case Management Agency is responsible for completing this form.

23.1 Add REM PCP Selection Form

MDH actors have ability to add this form. Upon add system displays a pop-up box confirming if the actor is sure about adding this form. The pop-up box also notifies the actor that upon add system will send an alert to the assigned Case Management Agency.

23.1.1 Primary Actors

Only MDH Actors can add a REM PCP Selection Form:

Department	Roles
MDH	MDH REM Administrator, MDH REM Intake Nurse, MDH REM Intake Specialist

23.1.2 REM PCP Selection Form Workflow

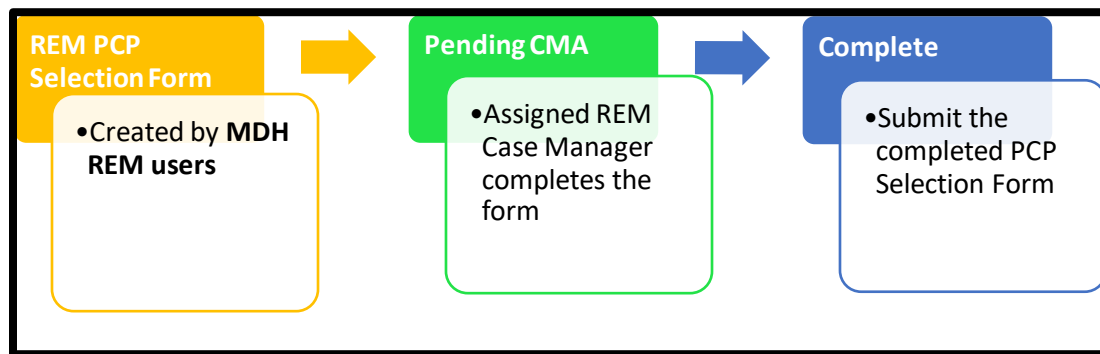


Figure 445- REM PCP Selection Form Workflow

23.1.3 Add REM PCP Selection Form

A REM PCP Selection Form can be created for a Client who has an “Active” “REM CMA Agency Assignment.”

Pre-Conditions:

- A REM CMA Agency must be assigned in order to add a REM PCP Selection form.
 - Hard stop if there is no REM CMA Agency assigned while adding the REM PCP Selection form.

- Error Message should state the following: "Please assign REM CMA Agency prior to adding the REM PCP Selection form"
- Only one REM PCP form can be added at one time. There cannot be multiple forms in "Pending CMA" status.

Use the following steps to add a REM PCP Selection Form:

1. From the Client Details tab, select the **Case Management** banner on the left navigation pane.
2. Select **REM PCP Selection Form**.
3. Select **Add** hyperlink.

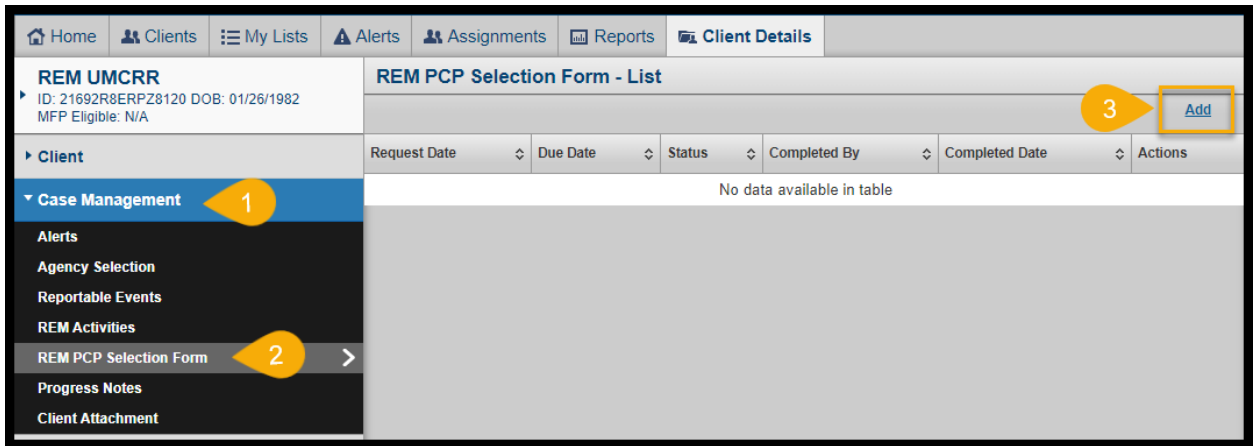


Figure 446-Add REM PCP Selection Form

4. System displays a confirmation pop-up box.
5. Select Yes in the pop-up box. System navigates the screen back to List Page.

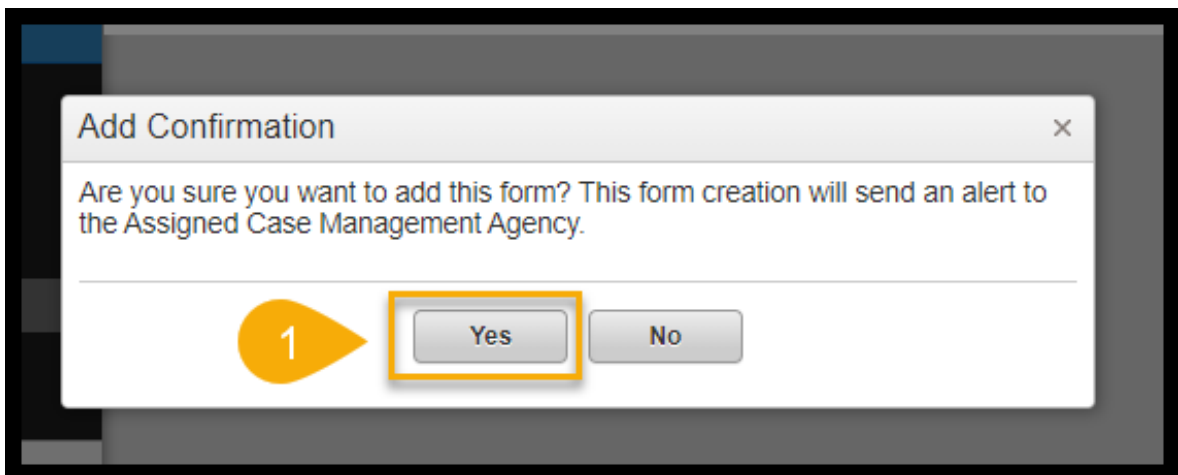


Figure 447445-Add Confirmation

6. System updates the status of the form to "Pending CMA" if Yes is selected.

REM PCP Selection Form - List						Add
Request Date	Due Date	Status	Completed By	Completed Date	Actions	
04/13/2020	05/13/2020	Pending CMA		N/A	View	

Figure 448-REM PCP Selection Form List Page

7. System sends an alert to Assigned Case Management Agency’s responsible actors.

23.1.4 Alert to the Assigned REM CMA upon Form Creation

System sends an alert upon the PCP Selection Form Creation.

- Alert is sent to the Assigned REM CMA Case Manager, if no Case Manager is assigned then the alert is sent to REM CMA Admin and REM CMA Intake Specialist
- Alert Message:
 “New REM applicant requires REM PCP Selection Form. Please complete and submit the form by **{Date}**” where {Date} will be pre-populated with the Due Date of the respective PCP Selection Form.

Client Alerts			
Created From Date:	Created To Date:	Accepted From Date:	Accepted To Date:
01/28/2013	04/13/2020	04/12/2020	04/13/2020
<input type="button" value="Filter"/>			<input type="checkbox"/> Show Accepted
Subject	From	Received	Accept?
New REM applicant requires REM PCP Selection Form. Please complete and submit the form by 05/13/2020	Intake Nurse1, MDH REM	04/13/2020	<input type="checkbox"/>

Figure 449-REM PCP Selection Form Alert to CMA actors

- The Message hyperlink will navigate the screen to the REM PCP Selection form – List page.

23.2 Edit REM PCP Selection Form

23.2.1 Primary Actors

Department	Roles
MDH	MDH REM Administrator
CMA	CMA REM Administrator, CMA REM Supervisor, Assigned CMA REM Case Manager, CMA REM Intake Specialist Only applicable to the Client’s Assigned Case Management Agency (CMA)

23.2.2 Edit REM PCP Selection Form

The REM PCP Selection Form can be edited while the form is in “Pending CMA” status. Use the following steps to edit a REM PCP Selection Form:

1. From the Client Details tab, select the **Case Management** banner on the left navigation pane.
2. Select **REM PCP Selection Form** to view the list of forms.
3. Select the **Edit** hyperlink under the Actions column to edit the form that is in “Pending CMA” status

REM PCP Selection Form - List						
Request Date	Due Date	Status	Completed By	Completed Date	Actions	
04/13/2020	05/13/2020	Pending CMA		N/A	View Edit	

Figure 450-REM PCP Selection Form List Page

- Edit the REM PCP Selection Form during "Pending CMA" status and click **Save**
NOTE: Use the **Cancel** hyperlink to ignore any changes, if needed.

The screenshot shows the 'REM PCP Selection Form' interface. At the top, the status is 'Pending CMA' and the due date is '05/13/2020'. There are 'View', 'Edit', and 'Save' buttons. The 'Overview' section contains a table with the following data:

Current MA#:	12345678985	Assigned Case Manager:	Case Manager1, CMA REM
Date to Case Manager:	04/13/2020	Enrolled in REM:	Yes
Assigned Case Management Agency:	THE COORDINATING CENTER	REM Qualifying Diagnosis:	D66 Hereditary factor VIII deficiency

The 'PCP Details' section includes several required fields (marked with double asterisks): Provider Name, Secondary Name, Address Line 1, Address Line 2, City, State, Zip Code, MA Provider Number, Phone Number, Fax, and Email. A 'Search' button is next to the Provider Name field. A checkbox labeled 'This is not a MA Provider' is located below the MA Provider Number field. A callout box explains: 'Select this check box if the PCP is not a MA Provider. upon selection MA Provider Number field will be grayed out and not required to submit.'

Figure 451-Edit & Save REM PCP Selection Form

NOTE: Fields denoted with double asterisk** indicates the fields are required to submit form.

- Provider Name field has a search action, upon use system displays Provider Search window where the actor can select the respective provider.

The 'Provider Search' window contains the following fields: Provider Name, Provider Number, County, and Provider Type (a dropdown menu). The dropdown menu is open, showing options: 'All', '20 - Physician', '23 - Nurse Practitioner', and '80 - Physician Assistant'. A 'Search' button is located below the search criteria. Below the search fields is a table with the following columns: Provider Name, Provider MA Number, Provider Address, and Actions. The table is currently empty, showing 'Showing 0 to 0 of 0 entries'. A 'Filter all columns' input field is at the bottom right.

Figure 452446-REM PCP Selection Form Provider Search

- If the actor selects the checkbox “This is not a MA Provider” in MA Provider Number field, then this field will be grayed out and not required to submit.

The screenshot shows a form field labeled "MA Provider Number:" followed by a grayed-out input box. Below the input box is a checked checkbox with the text "This is not a MA Provider".

Figure 453-MA Provider Number field

- Upon save system navigates the screen to View Mode.

23.3 List/View REM PCP Selection Form

23.3.1 Primary Actors

Department	Roles
MDH	MDH REM Intake Nurse, MDH REM Administrator
CMA	CMA REM Administrator, CMA REM Supervisor, Assigned CMA REM Case Manager, CMA REM Intake Specialist Only applicable to the Client’s Assigned Case Management Agency (CMA)

23.3.2 List / View Scenario

The REM PCP Selection Form List Page displays all the REM PCP Selection Forms added, Complete, or discarded. Follow these steps to display the REM Consent List page:

- From the Client Details tab, select the **Case Management** banner on the left navigation pane
- Select **REM PCP Selection Form** to view the list of forms.
- Select the **View** hyperlink under the Actions column to display the REM PCP Selection Form in view (read-only) mode.

The screenshot shows a table titled "REM PCP Selection Form - List". The table has the following columns: Request Date, Due Date, Status, Completed By, Completed Date, and Actions. A single row is displayed with the following values: Request Date: 04/13/2020, Due Date: 05/13/2020, Status: Complete, Completed By: CMA REM Case Manager1, Completed Date: 04/13/2020, and Actions: View.

Figure 454-REM PCP Selection Form List & View

REM PCP Selection Form Status: Pending CMA Due Date: 05/14/2020 View Edit

[Back to List](#) Submit Discard

REM PCP Selection Form

Overview

Current MA#:	12345678985	Assigned Case Manager:	Case Manager2, CMA REM
Date to Case Manager:	04/14/2020	Enrolled in REM:	Yes
Assigned Case Management Agency:	THE COORDINATING CENTER	REM Qualifying Diagnosis:	D66 Hereditary factor VIII deficiency

PCP Details

Provider Name: **

Secondary Name:

Address Line 1: **

Address Line 2:

City: **

State: **

Zip Code: **

MA Provider Number:

This is not a MA Provider

Phone Number: **

Fax:

Email:

Figure 455-REM PCP Selection Form View Read-Only Mode

23.4 Submit REM PCP Selection Form

The REM PCP Selection Form is ready for submission once all the required fields are complete. Upon submission form status is updated to “Complete.”

Use the following steps to submit the REM PCP Selection Form:

1. From the Client Details tab, select the **Case Management** banner on the left navigation pane
2. Select **REM PCP Selection Form** to view the list of forms

3. Select the **View** hyperlink under the Actions column to display the REM PCP Selection Form in view (read-only) mode
4. Click **Submit** the submit button to submit the completed REM PCP Selection Form.
5. Upon successful submission of the REM PCP Selection Form, system updates the status of the form to “Complete.”

REM PCP Selection Form - List						
Request Date	Due Date	Status	Completed By	Completed Date	Actions	
04/13/2020	05/13/2020	Complete	CMA REM Case Manager1	04/13/2020	View	

Figure 456447-Complete REM PCP Selection Form

23.5 Discard REM PCP Selection Form

The REM PCP Selection Form can be discarded when the form is in “Pending CMA” status.

Only MDH REM Administrator can discard the REM PCP Selection Form.

23.5.1 Primary Actors

The actors authorized to discard a REM PCP Selection Form include:

Department	Roles
MDH	MDH REM Administrator

1. From the Client Details tab, select the **Case Management** banner on the left navigation.
2. Select **REM PCP Selection Form** to view the list of forms
3. Select the **View** hyperlink under the Actions column to display the REM PCP Selection Form in view (read-only) mode.
4. Click on Discard from the View mode of the “Pending CMA” PCP Selection Form.

REM PCP Selection Form
Status: Pending CMA
Due Date: 05/13/2020
[View](#) [Edit](#)

[Back to List](#)
Submit
Discard

REM PCP Selection Form

Overview

Current MA#:	12345678985	Assigned Case Manager:	Case Manager1, CMA REM
Date to Case Manager:	04/13/2020	Enrolled in REM:	Yes
Assigned Case Management Agency:	THE COORDINATING CENTER	REM Qualifying Diagnosis:	D68 Hereditary factor VIII deficiency

PCP Details

Provider Name: **

Secondary Name:

Address Line 1: **

Figure 457-Discard PCP Selection Form

5. Upon Discard System display the confirmation pop-up box.
6. Enter a text in the **Comment** field and then click **Yes** to complete the process of discarding the REM PCP Selection Form (or click **No** to cancel discarding the form).

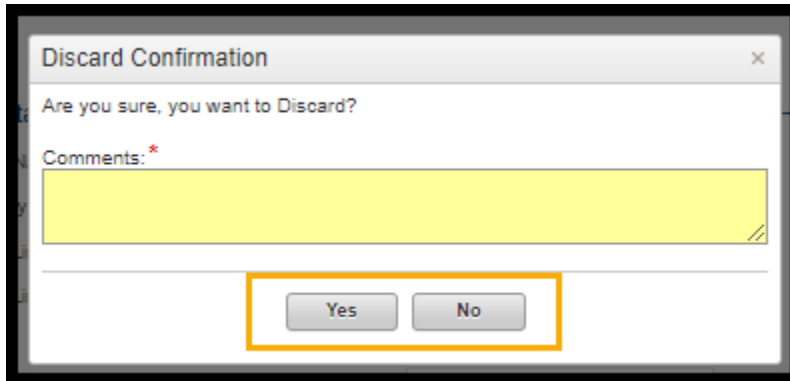


Figure 458-Discard confirmation comment

NOTE: * indicates a field required.

The REM PCP Selection Form List page will display the discarded status. Hover over and click the info-tip icon ⓘ to display the discard comment.

REM PCP Selection Form - List							Add
Request Date	Due Date	Comment	Completed By	Completed Date	Actions		
04/13/2020	05/13/2020	test discarded req		N/A	View		

Figure 459-REM PCP Selection Form List Successful Discard Info-tip

24 CMA Case Manager Assignment History Page

Once a Case Management Agency (CMA) is assigned to the Client, a CMA REM Case Manager can be assigned to the client. This page stores the CMA Case Manager Assignment History.

24.1 Primary Actors

Department	Roles
MDH	MDH REM Administrator, MDH REM Intake Specialist, MDH REM Intake Nurse, MDH REM Physician Advisor
Assigned CMA	CMA REM Administrator, CMA REM Supervisor, CMA REM Case Manager, CMA REM Intake Specialist, CMA REM Provider relations rep

24.2 Steps to navigate to REM CMA Case Manager Assignment History Page

1. From the Client Details tab, select the **Client** banner on the left navigation pane.
2. Select **Client Summary**.
3. Select **Current Assignments** Panel.
4. Click on **Assignment History** action from the right side of the Staff Assignments sub section.

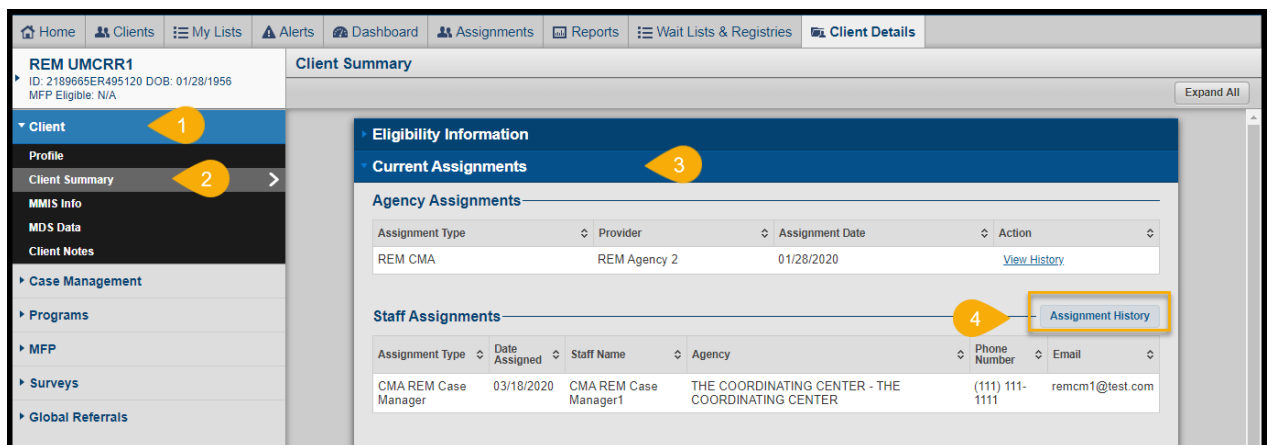


Figure 460-View REM - Case Manager Assignment

5. System navigates the screen to REM CMA Case Manager Assignment History Page
 - This page displays the history of the Case Manager Assignments for the client.
 - This page displays the reason for re-assignment and comment captured during the re-assignment of the new case manager to the client within the same agency.
 - This page also captures the Assignment End Date which is captured for any past assignments those are not active as of current system date.

REM CMA Case Manager Assignment History									
Back to Client Summary 1									
Date Assigned	Assignment End Date	CM Name	Assigned By	Agency	Phone Number	Email	Reason for Re-assignment	Comments	
04/14/2020		CMA REM Case Manager1	Administrator1, MDH REM	THE COORDINATING CENTER	(111) 111-1111	remcm1@test.com	Case Manager Leaving Agency	test	
04/14/2020	04/14/2020	CMA REM Case Manager2	Administrator1, MDH REM	THE COORDINATING CENTER	(222) 222-2222				

Figure 461-List REM - Case Manager Assignment

25 REM Appeals

A REM appeal is initiated if a client was disenrolled or denied and they decide to appeal the decision on their enrollment. Once the appeal is initiated it requires a disposition for the final decision. The client can choose to remain enrolled in REM Program during the appeal period if they reach out to MDH within the 10 days of their disenrollment.

25.1 REM Appeals & Dispositions Workflow

- **Appeals Workflow**
 - “In Progress” status
 - “Submitted” status

Note: Disposition can only be added if there is a submitted appeal.

- **Disposition Workflow**
 - “In Progress” status
 - “Submitted” status

25.2 Add/Edit REM Appeal

Preconditions:

- REM Appeal can only be added if there is a latest submitted Disenrolled or Denied ODF for REM in the system for the client.
- Only ODFs with the following Disenrollment Reasons will be allowed to add a REM Appeal.
 1. Participant Aged out
 2. Participant Receiving Medicare
 3. Participant no longer has a REM Diagnosis
 4. Other

25.2.1 Primary Actors

The following user roles can add a REM Appeal:

Department	Roles
MDH	MDH REM Administrator

1. From the Client Details tab, actor selects the **Programs** banner on the left navigation.
2. The actor selects **Appeals & Dispositions** from the left-hand side of the panel.
3. The system opens the **Appeals & Dispositions List Page**.
4. Click on **Add Appeal hyperlink** from the right-hand side of the page.

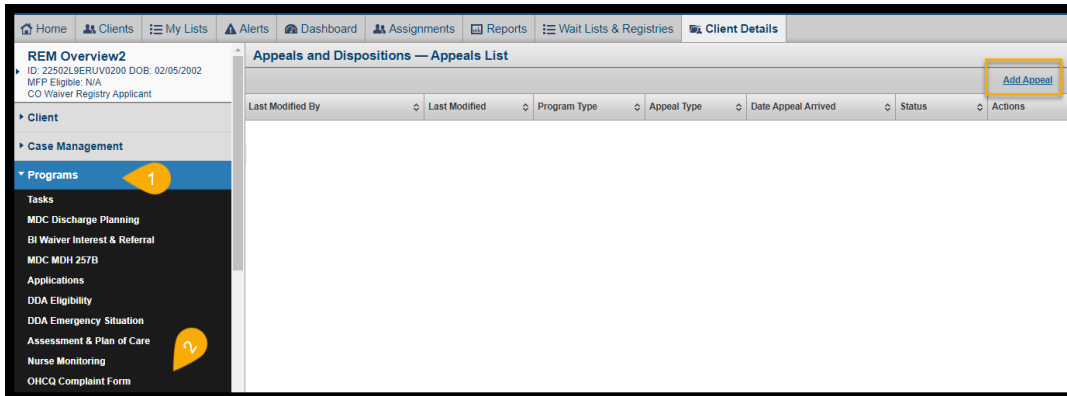


Figure 462-REM Appeal List Page

5. System displays a **Program Type** pop up box. Select REM from the list and click on OK.

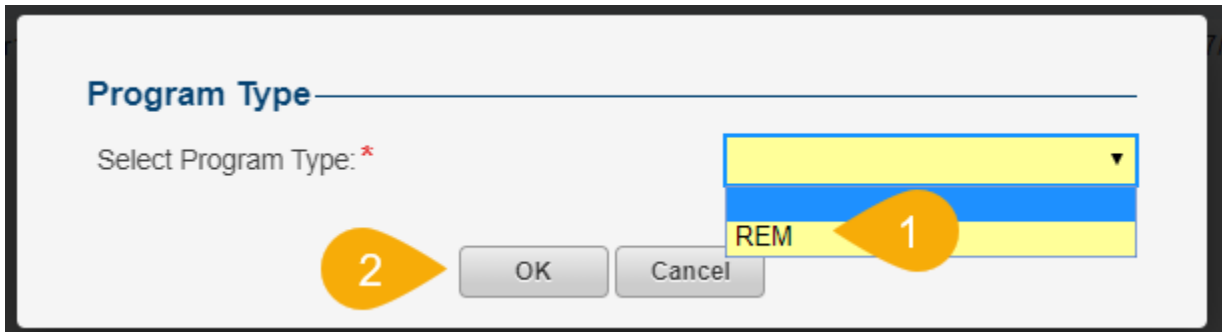


Figure 463-REM Appeals - Add

6. System navigates the screen to **Appeals & Dispositions – Appeal Edit Page**.
7. Actor completes the form and clicks on Save.

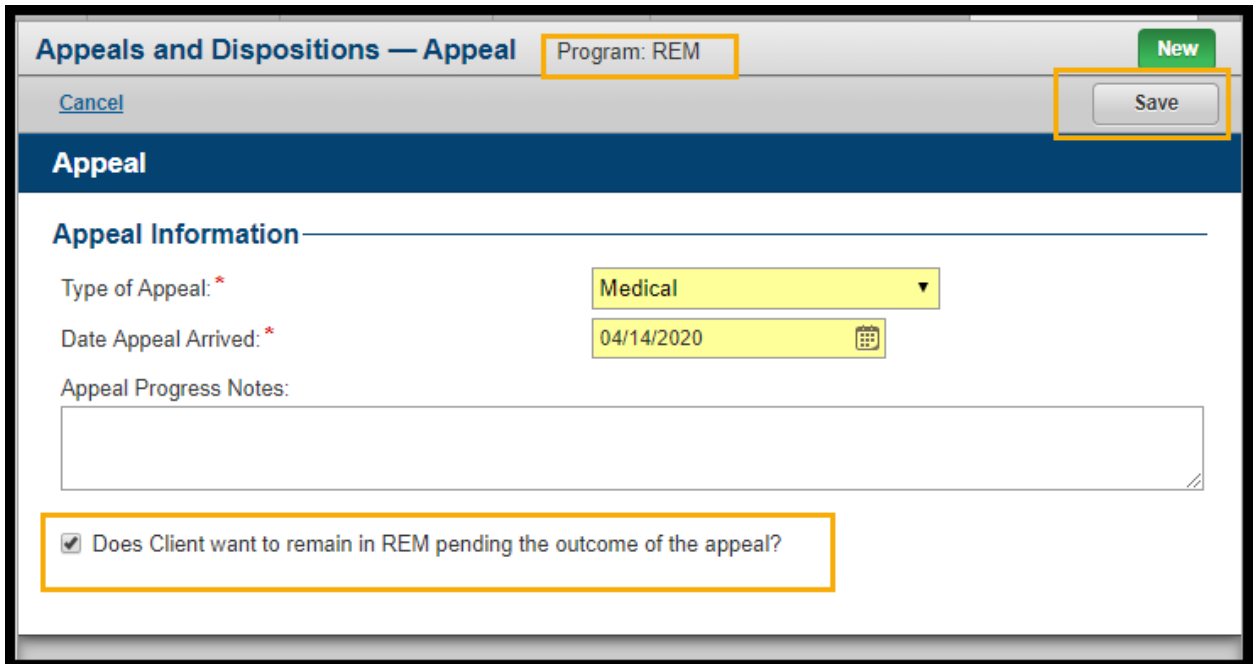


Figure 464-REM Appeals Edit Page

8. Upon save system navigates the screen to View Mode.
9. Click on Submit to submit the appeal from the Appeals View Page.

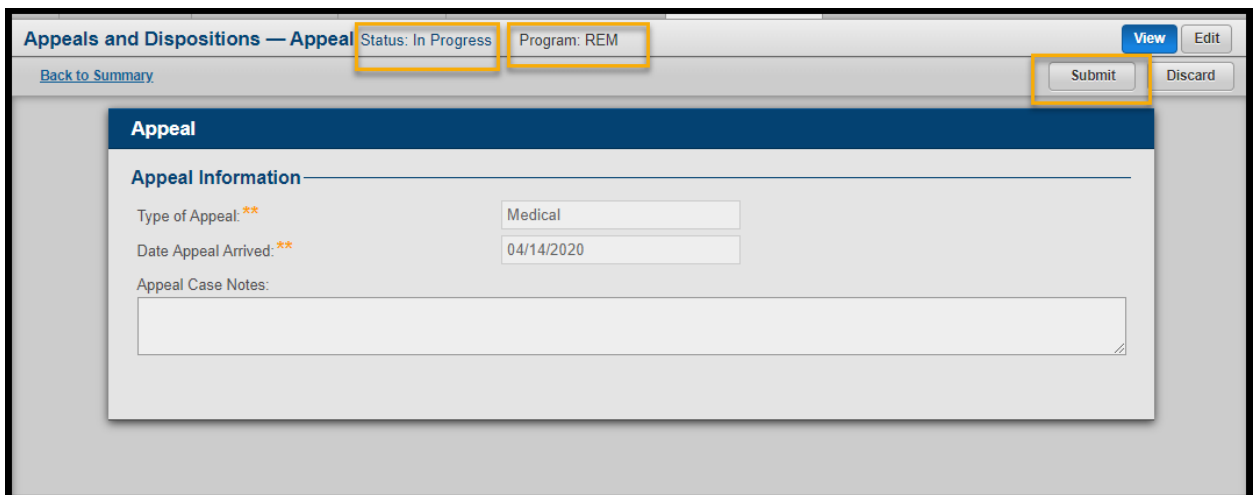


Figure 465-REM Appeals View Page

25.3 List/View REM Appeals

25.3.1 Primary Actors

Department	Roles
MDH	REM Intake Nurse, REM Administrator, REM Intake Specialist, REM Physician Advisor

Assigned CMA	CMA REM Administrator, CMA REM Supervisor, CMA REM Case Manager, CMA REM Intake Specialist, CMA REM Provider Relations Rep
---------------------	--

25.3.2 List/View a REM Appeal

1. From the Client Details tab, actor selects the **Programs** banner on the left navigation.
2. The actor selects **Appeals & Dispositions** from the left-hand side of the panel.
3. The system opens the **Appeals & Dispositions List Page**.

Appeals and Dispositions — Appeals List								Add Appeal
Last Modified By	Last Modified	Program Type	Appeal Type	Date Appeal Arrived	Status	Actions		
Administrator1 MDH REM	04/14/2020	REM	Medical	04/14/2020	Submitted	Summary		
Administrator1 MDH REM	04/14/2020	REM	Medical	03/17/2020	Submitted	Summary		
Administrator1 MDH REM	03/17/2020	REM	Other	03/17/2020	Submitted	Summary		
Administrator1 MDH REM	03/17/2020	REM	Medical	03/17/2020	Discarded	Summary		

Figure 466-REM Appeals - List

4. Click on Summary to navigate to the Summary Page of the respective REM Appeal.
5. From the Summary page actor can add a Disposition.
 Note: Only MDH REM Admin can add a Disposition. The appeal must be in submitted status in order to add a disposition.

Note: An Appeal can be discarded in “In Progress” and “Submitted” status.

25.4 Dispositions

MDH REM Admin can add a disposition for a submitted REM Appeal.

25.4.1 Primary Actors

- **Add/Edit Dispositions:**

Department	Roles
MDH	MDH REM Administrator

- **List/ View Dispositions**

Department	Roles
MDH	REM Intake Nurse, REM Administrator, REM Intake Specialist, REM Physician Advisor
Assigned CMA	CMA REM Administrator, CMA REM Supervisor, CMA REM Case Manager, CMA REM Intake Specialist, CMA REM Provider Relations Rep

25.4.2 Adding and submitting a Disposition

Steps:

1. From the Client Details tab, actor selects the **Programs** banner on the left navigation.
2. The actor selects **Appeals & Dispositions** from the left-hand side of the panel.
3. The system opens the **Appeals & Dispositions List Page**.
4. Click on Summary for a Submitted Appeal to navigate to the Summary Page of the respective REM Appeal.
5. From the Summary page actor can add a Disposition from the Dispositions Panel

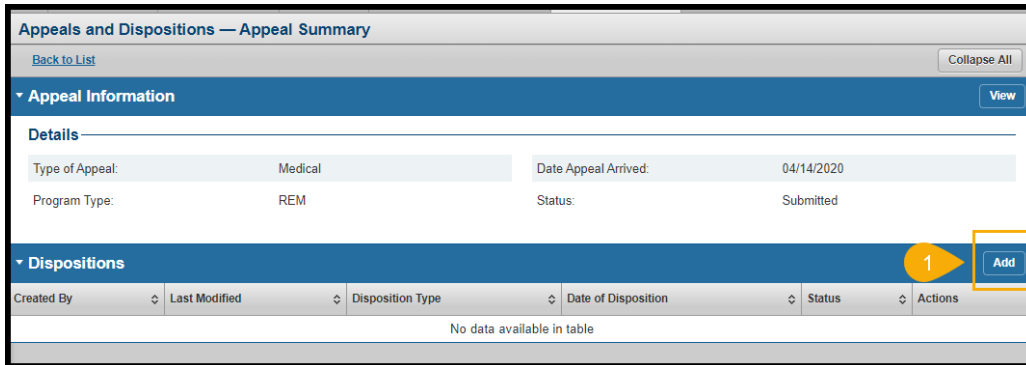


Figure 467-Add Disposition

6. System navigates the screen to Disposition Edit Page.
7. Actor completes the form and Clicks on Save.

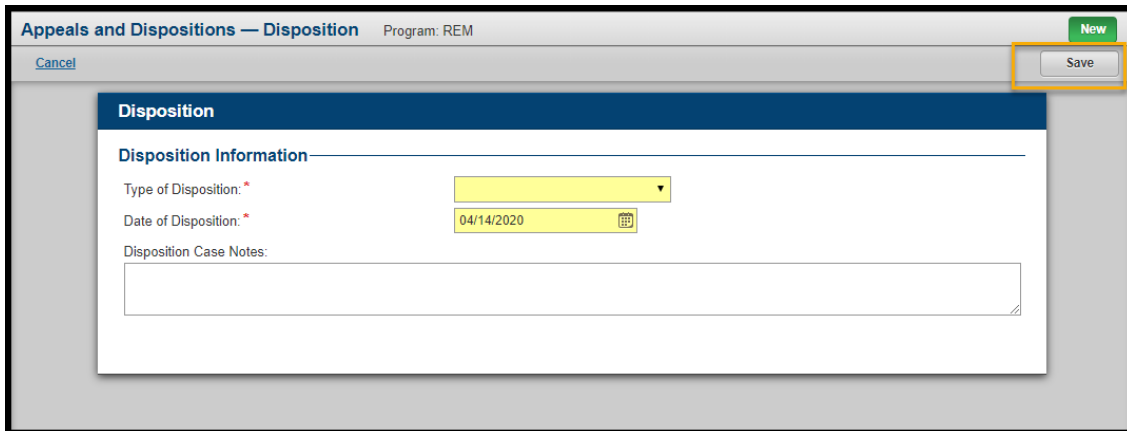


Figure 468-Edit Disposition

8. Type of Disposition will have the following options as displayed in the figure below:

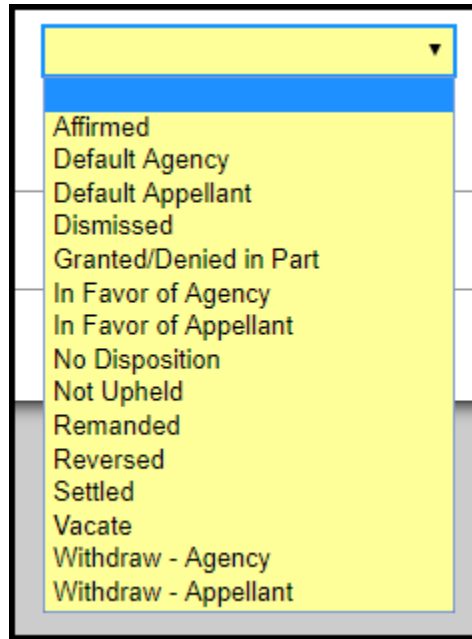


Figure 469-Type of Disposition - options

9. System Navigates the screen to View Mode.

10. Actor Submits the Disposition.

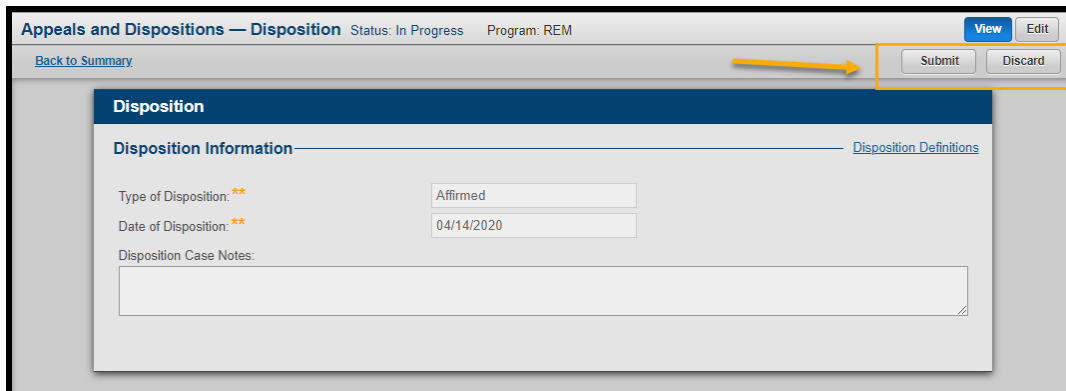


Figure 470-Edit Disposition

11. Upon submission of the Disposition, System sends an alert to MDH REM Admin with the following message:

- "A Disposition has been added"
- Hyperlink navigates the screen to Appeals List Page

Note: A Disposition can be discarded in "In Progress" and "Submitted" status.

26 REM PCP Selection Form - My List

The purpose of this My List is to allow the users to generate the list of clients who have PCP Selection Form in an open status such as “Pending CMA.” User can generate the list and then complete the form for any open case.

REM PCP Selection Form My List									
Show me*									
All Clients with Pending CMA									
Filter									
First Name	Last Name	Request Date	Created By	Due Date	# of Days Due/Overdue	Assigned REM CM	Assigned REM CM Supervisor	Actions	
REM	DryRun SCF	03/09/2020	Administrator1, MDH REM	04/08/2020	-6	CMA REM Case Manager2	CMA REM Supervisor 2	View	
ReferralReport	Client_1	03/10/2020	Admin, MDHREM	04/09/2020	-5	CMA REM Case Manager1	CMA REM Supervisor 1	View	
Preuat9	Feedback	03/02/2020	Administrator1, MDH REM	04/01/2020	-13	Agency 2 Case Manager	Agency 2 REM Admin	View	

Figure 471-My Lists: All Clients PCP Selection Form My List

26.1 All Clients - My List PCP Selection Form Show Me Options and List Page

The following Show Me Options will be in All Clients PCP Selection Form My List:

- All Clients with Pending CMA (PCP Selection Form):
 - This option is available for the following users:
 - MDH REM Admin, MDH REM Intake Nurse, MDH REM Intake Specialist
 - CMA REM Admin, CMA REM Supervisor, CMA REM intake Specialist – Only clients assigned to their agency
 - Upon selection, this will display list of the clients who have PCP Selection Form in “Pending CMA” Status.
 - MDH users will be able to see all the clients fulfilling the above criteria.
 - CMA users will be able to see all the clients assigned to their respective Case Management Agency and fulfills the above criteria.

First Name	Last Name	Request Date	Created By	Due Date	# of Days Due/Overdue	Assigned REM CM	Assigned REM CM Supervisor	Actions
REM	UMCRR	04/14/2020	Administrator1, MDH REM	05/14/2020	30	CMA REM Case Manager2	CMA REM Supervisor 2	View
Test6	REMReport	03/17/2020	Admin, MDHREM	04/16/2020	2	CMA REM Case Manager3	CMA REM Supervisor 1	View
LOC_Client13	Test	04/02/2020	Administrator1, MDH REM	05/02/2020	18	CMA REM Case Manager3	CMA REM Supervisor 1	View
Jeanette	Test	03/30/2020	Administrator1, MDH REM	04/29/2020	15	CMA REM Case Manager1	CMA REM Supervisor 1	View
Conner	REM-Assessment	03/27/2020	Administrator1, MDH REM	04/26/2020	12	CMA REM Case Manager1	CMA REM Supervisor 1	View
AssessmentLOC_Client5	Test	01/28/2020	Administrator1, MDH REM	01/29/2020	-76	CMA REM Case Manager2	CMA REM Supervisor 2	View

Figure 472-My Lists: All Clients PCP Selection Form My List

- All Clients with Overdue (PCP Selection Form):
 - This option is available for the following users:
 - MDH REM Admin, MDH REM Intake Nurse, MDH REM Intake Specialist
 - CMA REM Admin, CMA REM Supervisor, CMA REM intake Specialist – Only clients assigned to their agency
 - Upon selection, this My List will display list of the clients whose PCP Selection Form has passed due date and is still in “Pending CMA” status.
 - MDH users will be able to see all the clients fulfilling the above criteria.
 - CMA users will be able to see all the clients assigned to their respective Case Management Agency and fulfills the above criteria.

First Name	Last Name	Request Date	Created By	Due Date	# of Days Due/Overdue	Assigned REM CM	Assigned REM CM Supervisor	Actions
REM	DryRun SCF	03/09/2020	Administrator1, MDH REM	04/08/2020	-6	CMA REM Case Manager2	CMA REM Supervisor 2	View
ReferralReport	Client_1	03/10/2020	Admin, MDHREM	04/09/2020	-5	CMA REM Case Manager1	CMA REM Supervisor 1	View
Preuat9	Feedback	03/02/2020	Administrator1, MDH REM	04/01/2020	-13	Agency 2 Case Manager	Agency 2 REM Admin	View
Test2	REMReport	03/09/2020	Administrator1, MDH REM	04/08/2020	-6	CMA REM Case Manager3	CMA REM Supervisor 1	View
ODF_Deny	Test	03/05/2020	Administrator1, MDH REM	04/04/2020	-10	Agency 2 Case Manager	Agency 2 REM Admin	View
Test12	REMReport	03/09/2020	Administrator1, MDH REM	04/08/2020	-6	CMA REM Case Manager3	CMA REM Supervisor 1	View

Figure 473-My Lists: All Clients with Overdue PCP Selection Form My List

5. Upon use of any of these options system displays the REM PCP Selection Form My List Page.

6. List Page will display the relevant fields for the My List.

26.2 My Clients – My List PCP Selection Form

The following Show Me Options will be in My Clients PCP Selection Form My List:

- My Clients with Pending CMA (PCP Selection Form):
 - This option is only available to CMA REM Case Manager.
 - Upon selection, this will display list of the clients who have PCP Selection Form in “Pending CMA” Status and are assigned to the CMA Case Manager logged in.

First Name	Last Name	Request Date	Created By	Due Date	# of Days Due/Overdue	Assigned REM CM	Assigned REM CM Supervisor	Actions
ReferralReport	Client_1	03/10/2020	Admin, MDHREM	04/09/2020	-5	CMA REM Case Manager1	CMA REM Supervisor 1	View
Conner	REM-Assessment	03/27/2020	Administrator1, MDH REM	04/26/2020	12	CMA REM Case Manager1	CMA REM Supervisor 1	View
Jeanette	Test	03/30/2020	Administrator1, MDH REM	04/29/2020	15	CMA REM Case Manager1	CMA REM Supervisor 1	View
REM1.1	PreAUT1 Modules	03/10/2020	Administrator1, MDH REM	04/09/2020	-5	CMA REM Case Manager1	CMA REM Supervisor 1	View
Test20	REMReport	02/20/2020	Intake Nurse1, MDH REM	03/20/2020	-25	CMA REM Case Manager1	CMA REM Supervisor 1	View

Figure 474-My Lists: My Clients with Pending CMA PCP Selection Form My List

- My Clients with overdue (PCP Selection Form):
 - This option is only available to CMA REM Case Manager.
 - Upon selection, this will display list of the clients whose PCP Selection Form has passed due date and is in “Pending CMA” status and are assigned to the logged in Case Manager.

First Name	Last Name	Request Date	Created By	Due Date	# of Days Due/Overdue	Assigned REM CM	Assigned REM CM Supervisor	Actions
ReferralReport	Client_1	03/10/2020	Admin, MDHREM	04/09/2020	-5	CMA REM Case Manager1	CMA REM Supervisor 1	View
REM1.1	PreAUT1 Modules	03/10/2020	Administrator1, MDH REM	04/09/2020	-5	CMA REM Case Manager1	CMA REM Supervisor 1	View
Test20	REMReport	02/20/2020	Intake Nurse1, MDH REM	03/20/2020	-25	CMA REM Case Manager1	CMA REM Supervisor 1	View

Figure 475- My Lists: My Clients with Overdue PCP Selection Form My List

1. Upon selection of any of these options, system displays the REM PCP Selection Form My List Page.
2. List Page will display the relevant fields for the My List.

27 REM Assessment - My List

The purpose of this My List is to allow users to get a visibility in their work queue for REM Assessment and how an authorized actor can generate the My List for various scenarios of REM Assessment.

Access to My List filters is role-based. The applicable users will be from the following 2 groups:

MDH: MDH REM Administrator, MDH REM Intake Nurse, MDH REM Intake Specialist, MDH REM Physician Advisor

Assigned CMA: CMA REM Administrator, CMA REM Supervisor, CMA REM Case Manager

NOTE: Assigned CMA user roles will only be able to see results of the clients assigned to their agency.

27.1 All Clients with In-Progress or Offline Assessment My List

- This option is available for the following users:
 - MDH REM Admin, MDH REM Intake Nurse, MDH REM Intake Specialist, MDH REM Physician Advisor
 - CMA REM Administrator, CMA REM Supervisor, CMA REM intake Specialist – Only clients assigned to their agency
- This My List has the following filter options:
 - Show Me: All Clients with In-Progress or Offline Assessment
 - Status: In Progress, Offline, Select All
- Based on the status selected system will display all the clients with a REM Assessment in the selected status.
- If the user selects “Select All”, then the system will display all the clients with a REM Assessment in either In Progress or Offline status.

Note:

- MDH users will see all the clients with REM Assessments in the selected status
- CMA users will see all the clients assigned to their respective Case Management Agency with REM Assessment in the selected status

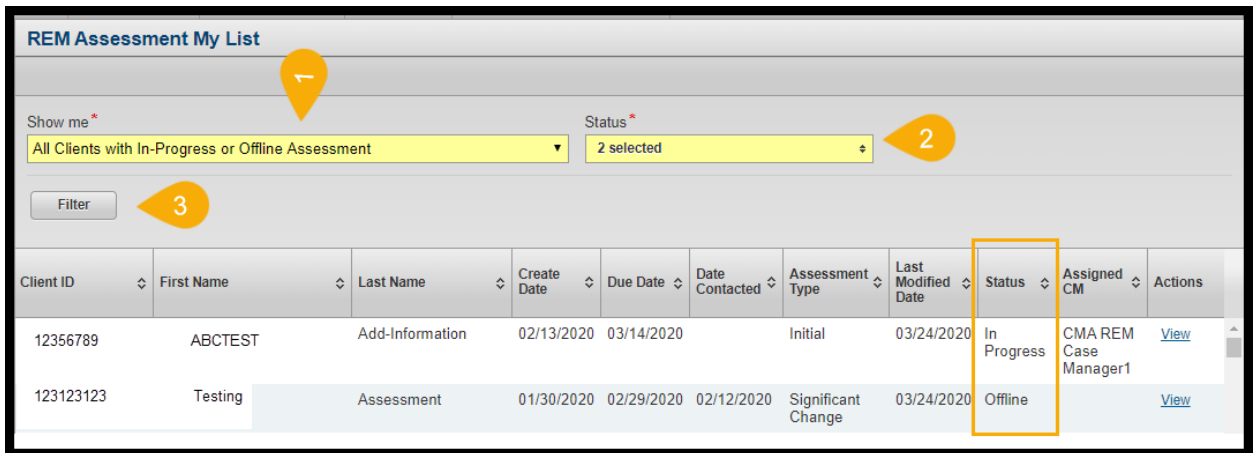


Figure 476-REM Assessment: All Clients List

27.2 My Clients with In-Progress or Offline Assessment My List

- This option is available for the following users:
 - CMA REM Supervisor – Only the clients who’s REM Assessments are awaiting the logged in CMA REM Supervisor’s review.
 - CMA REM Case Manager – Only the clients assigned to them.
- This My List has the following filter options:
 - Show Me: My Clients with In-Progress or Offline Assessment
 - Status: In Progress, Offline, Select All.
- Based on the status selected system will display all the clients with a REM Assessment in the selected status assigned to the logged in user.
- If the user selects “Select All”, then the system will display all the clients assigned to the logged in user with a REM Assessment in either In Progress or Offline status.

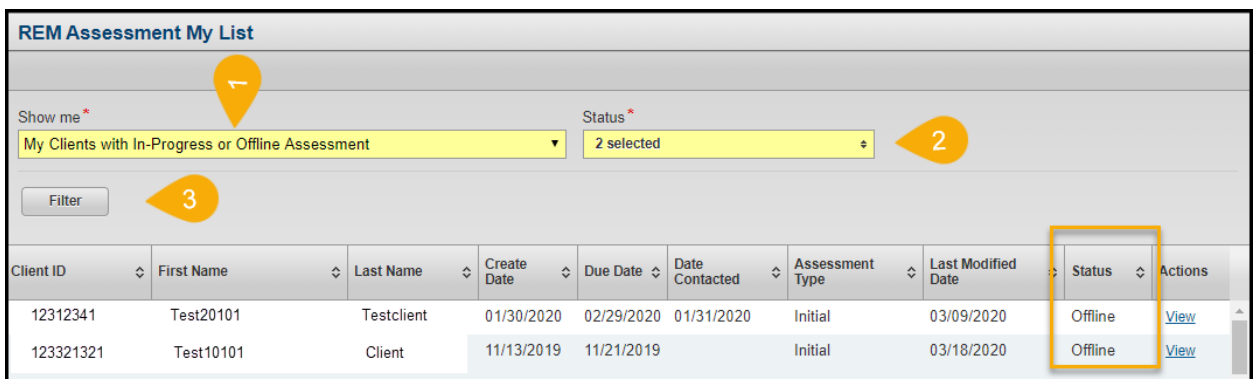


Figure 477-REM Assessment: My Clients List

28 REM Case Management Plan My List

The REM Case Management Plan My List offers a set of filters called “Show Me” options that enables users to monitor Case Management Plans in various Statuses. Each filter corresponds to a different status in the REM Case Management Plan.

Access to My List filters is role-based. The applicable users will be from the following 2 groups:

- **MDH:** MDH REM Administrator
- **Assigned CMA:** CMA REM Administrator, CMA REM Supervisor, CMA REM Case Manager, CMA REM Intake Specialist, CMA REM Provider relations rep

28.1 All Clients List – Case Management Plan My List

This My List is available to the following users:

MDH: MDH REM Admin

CMA: CMA REM Administrator, CMA REM Supervisor, CMA REM Intake Specialist, CMA REM Provider relations rep.

Note:

For CMA users, the list will display the CMPs for clients assigned to their Case Management Agency.

For MDH role, the list will display the CMPs for all clients enrolled in REM.

1. This My List will only display the clients who have their CMPs in an open status.
2. The user may select from the following Show Me options:

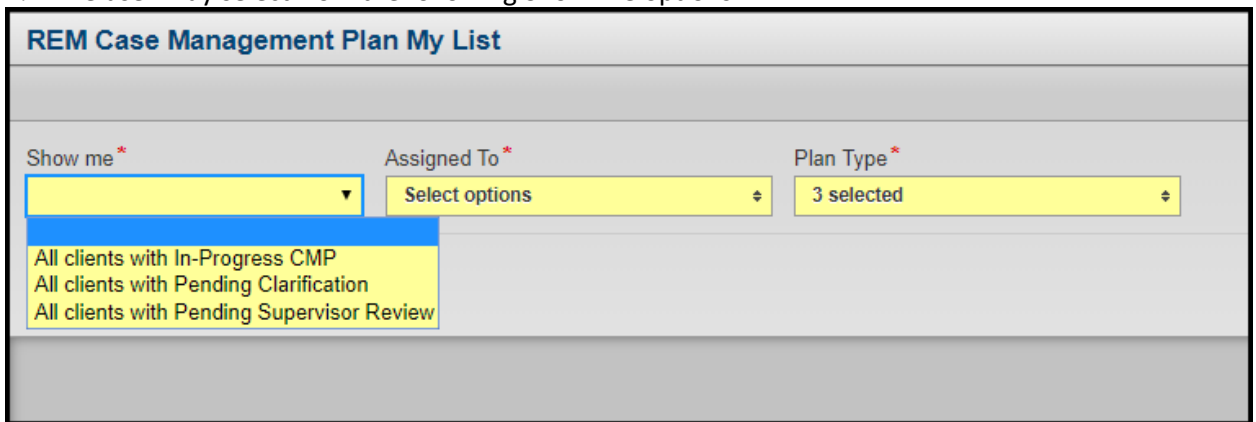


Figure 478-REM CMP My List – All Clients List

3. User will select applicable options from the three (3) fields
 - a. Show Me:
 - i. All clients with In-Progress CMP: Upon selection of this option, system will display a list of all the clients who have a REM CMP in “In Progress” status.

- ii. All clients with Pending Clarification: Upon selection of this option, system will display a list of all the clients who have a REM CMP in “Pending Clarification” status.
 - iii. All clients with Pending Supervisor Review: Upon selection of this option, system will display a list of all the clients who have a REM CMP in “Pending Supervisor Review” status.
 - b. Assigned To: This field will display the list of all the CMA REM Case Managers.
 - c. Plan Type:
 - i. Initial
 - ii. Revised
 - iii. Significant Change
- 4. Upon clicking on Filter, List Page will display the relevant fields for the My List.

Client ID	First Name	Last Name	CM Assigned	Date Created	Plan Type	Due Date	Actions
123123432	Test11	T101		12/13/2019	Initial	11/18/2019	View
123456789	Test22	T201	CMA REM Case Manager2	12/04/2019	Significant Change	12/11/2019	View

Figure 479-REM CMP My List – All Clients List

28.2 My Clients List – Case Management Plan My List

1. Only CMA REM Case Manager will have access to the My Clients list for Case Management Plan.
2. This My List will only display the clients who have their CMPs in an open status and are assigned to the logged in CMA REM Case Manager.
3. The user may select from the following Show Me options:

Figure 480-REM CMP My List – My Clients List

4. User will select applicable options from the three (3) fields

- a. Show Me:
 - i. My clients with In-Progress CMP: Upon selection of this option, system will display a list of all the clients assigned to the logged in user and who have a REM CMP in “In Progress” status.
 - ii. My clients with Pending Clarification: Upon selection of this option, system will display a list of all the clients assigned to the logged in user and who have a REM CMP in “Pending Clarification” status.
 - iii. My clients with Pending Supervisor Review: Upon selection of this option, system will display a list of all the clients assigned to the logged in user and who have a REM CMP in “Pending Supervisor Review” status.
 - b. Assigned To: This field will display the name of CMA REM Case Manager logged in.
 - c. Plan Type:
 - i. Initial
 - ii. Revised
 - iii. Significant Change
5. Upon clicking on Filter, List Page will display the relevant fields for the My List.

Client ID	First Name	Last Name	CM Assigned	Date Created	Plan Type	Due Date	Actions
12341234	Test101	REM-Assessment	CMA REM Case Manager2 (me)	12/04/2019	Significant Change	12/11/2019	View
121232131	Test 201	Test	CMA REM Case Manager2 (me)	02/24/2020	Initial	03/21/2020	View
126565651	Test 301	UAT Client	CMA REM Case Manager2 (me)	01/30/2020	Initial	02/29/2020	View

Figure 481-REM CMP My List – My Clients List

28.3 My Team’s List – Case Management Plan My List

1. Only CMA REM Supervisor will have access to the My Team’s list for Case Management Plan
2. This My list will only display the clients who have their CMPs in an open status and are assigned to the logged in Supervisor’s Case Manager.
3. The user may select from the following Show Me options:
4. User will select applicable options from the three (3) fields
 - a. Show Me:
 - i. My Team’s In-Progress CMPs: Upon selection of this option, system will display a list of all the clients who have a REM CMP in “In Progress” status for the case manager selected.

- ii. My Team’s Pending Clarification CMPs: Upon selection of this option, system will display a list of all the clients who have a REM CMP in “In Progress” status for the case manager selected.
 - b. Assigned To: This field will display the names of all the CMA REM Case Managers whose Supervisor is the logged in CMA REM Supervisor.
 - c. Plan Type:
 - i. Initial
 - ii. Revised
 - iii. Significant Change
5. Upon clicking on Filter, List Page will display the relevant fields for the My List.

REM Case Management Plan My List

Show me* Assigned To* Plan Type*

My Team's Pending Clarification CMPs CMA REM Case Manager1 3 selected

Filter

Client ID	First Name	Last Name	CM Assigned	Date Created	Plan Type	Due Date	Actions
121212121	Test101	Test201	CMA REM Case Manager1	12/16/2019	Significant Change	12/23/2019	View

Figure 482-REM CMP My List – My Team’s List

29 REM Appeals & Dispositions My List

The REM Appeals & Disposition My List offers one (1) Show Me option that will display the list of all the clients who have an Appeal in submitted status but does not have a Disposition submitted.

29.1 Appeals without dispositions My List

- Only MDH REM Admin has access to this report.
- This report displays two (2) filter options:
 - Show Me:
 - Appeals without dispositions: Displays the list of clients who have an Appeal in submitted status but do not have a Disposition submitted yet.
 - Type:
 - REM: Displays a list of programs with REM added to the list.
- Upon filtering the My List with REM Program selected, system will display All the clients with a REM Appeal submitted.

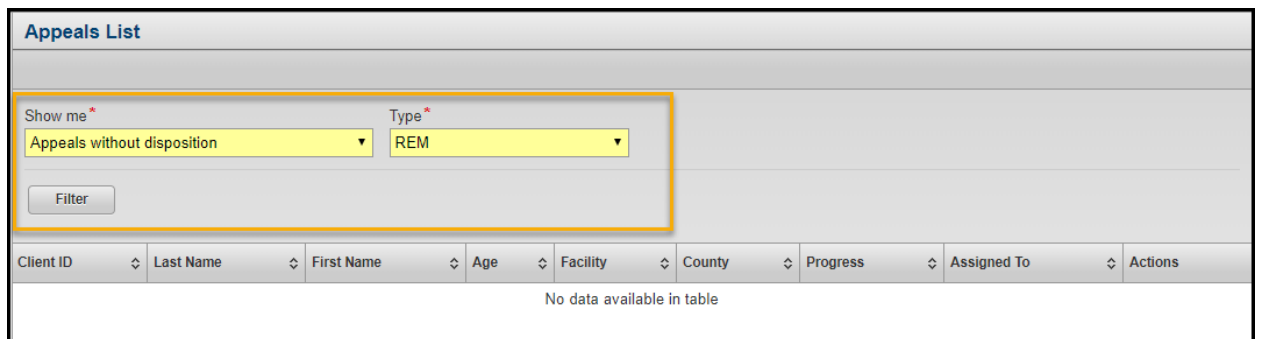


Figure 483448-REM Appeals My List

1. Navigate to the My Lists tab from top navigation bar.
2. Select My Clients List panel from left navigation.
3. Select Appeals and Eligibility Change.
4. System displays the My List page for Appeals.
5. Select Appeals without disposition in show me field
6. Select REM from Type field and click Filter.
7. System will display all the clients who have a REM Appeal in Submitted Status but does not have a disposition yet on the List Page.

30 REM PDN Assessment

The REM PDN Assessment is a comprehensive assessment tool that is used in the determination of whether nursing services are medically necessary for a client.

This manual detail the system processes necessary to add, complete and submit the REM PDN Assessment, information about the content of the REM PDN Assessment, Alerts, CMA Supervisor review, submission process, REM PDN Assessment My List and REM PDN Activity Report.

30.1 PDN Assessment Types

There are three (5) types of PDN assessments: Request, Initial, Medicare, Annual and Change in Services

PDN ASSESSMENT	DESCRIPTION
Request	Request can be made to complete a REM PDN Assessment at any given time by MDH.
Initial	Manually added by CMA the first time PDN Assessment is added. Initial PDN Assessment is required the first time, for any reason that PDN is required.
Medicare	Manually added every six months, System only allows the user to add Medicare PDN in December, January, June or July and can only be added once the user has an Initial PDN Assessment added and completed.
Annual	Can be manually added every 315 days from the latest completed PDN Assessment and it's not due until 365 days from the latest completed REM PDN Assessment. Can only be added once the user has an Initial PDN Assessment added and completed
Change in Services	Manually added anytime once Initial Assessment has been submitted Note: Change in Services PDN Assessment can be added anytime the client becomes eligible for Medicare, unless the client becomes eligible in December, January, June or July when the system allows the users to add Medicare PDN Assessment.

30.2 Primary Actors

1. The following user roles can **Add or Edit** a REM Assessment:

Department	Roles
Assigned CMA	CMA REM Case Manager, CMA REM Supervisor, CMA REM Administrator

2. The following user roles can **Request** a REM Assessment:

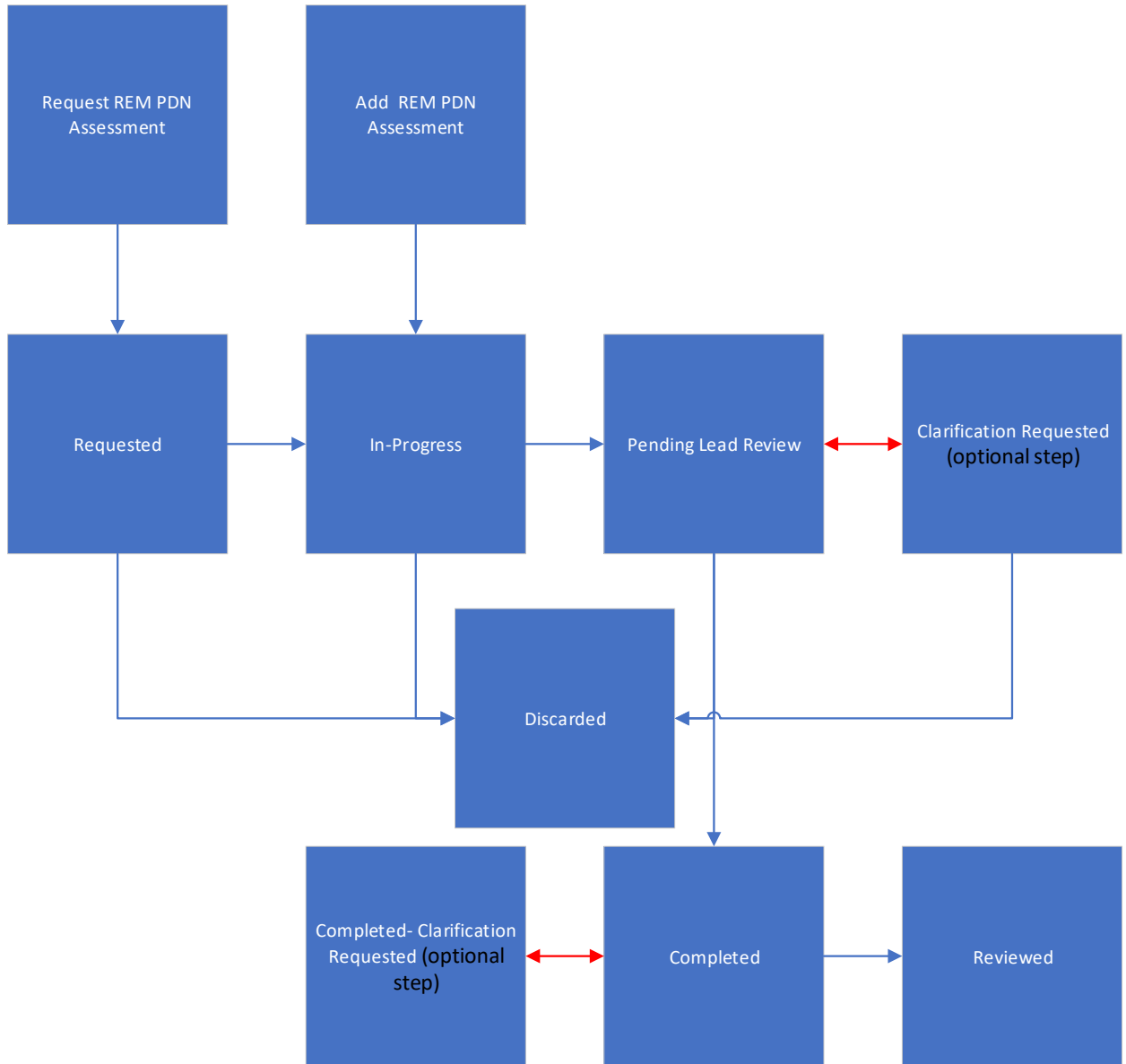
Department	Roles
MDH	MDH DONS Nurse, MDH REM Administrator, MDH REM Intake Nurse

3. The following user roles can **List or View** REM Assessment:

Department	Roles
MDH	MDH DONS Nurse, MDH DONS Admin, MDH DONS View only, MDH Admin DDA Admin, MDH MDC Admin, MDH REM Admin, MDH REM Intake Nurse
Assigned CMA	CMA REM Administrator, CMA REM Supervisor, CMA REM Case Manager

30.3 REM PDN Assessment Workflow

- Upon creating a Request, the status will change to “Requested”
- Once the REM PDN Assessment is created, it will be in “In Progress” Status
- Upon submission for lead review, status will change to “Pending Lead Review”
- If the lead has any questions or clarifications, they can send it back for Clarification Request (optional step), which will change the status to “Clarification Requested”
- Upon submission to MDH, the PDN assessment will transition to “Completed” status.
- Upon completion if DONS have any questions for CMA, they can send it back for Clarification Request (optional step), which will change the status to “Completed- Clarification Requested”
- If discarded, the assessment will transition to “Discarded” status. It can be Discarded in the following statuses:
 - Requested, In Progress, Pending Lead Review and Clarification Requested



30.4 View REM PDN Assessment List Page

Users can view the list of REM PDN Assessments available for a client through following steps:

To view REM PDN Assessment list for a client,

1. Select **Clients** tab, Enter Client search criteria and Click **Cases**.
2. From the search results list, select **Client Summary** hyperlink
3. From the Client Profile, select the **Programs** banner on the left navigation.
4. Select **REM PDN Assessment**.

5. System will navigate the user to the REM PDN Assessment-List page, which displays the list of all the REM PDN Assessments.

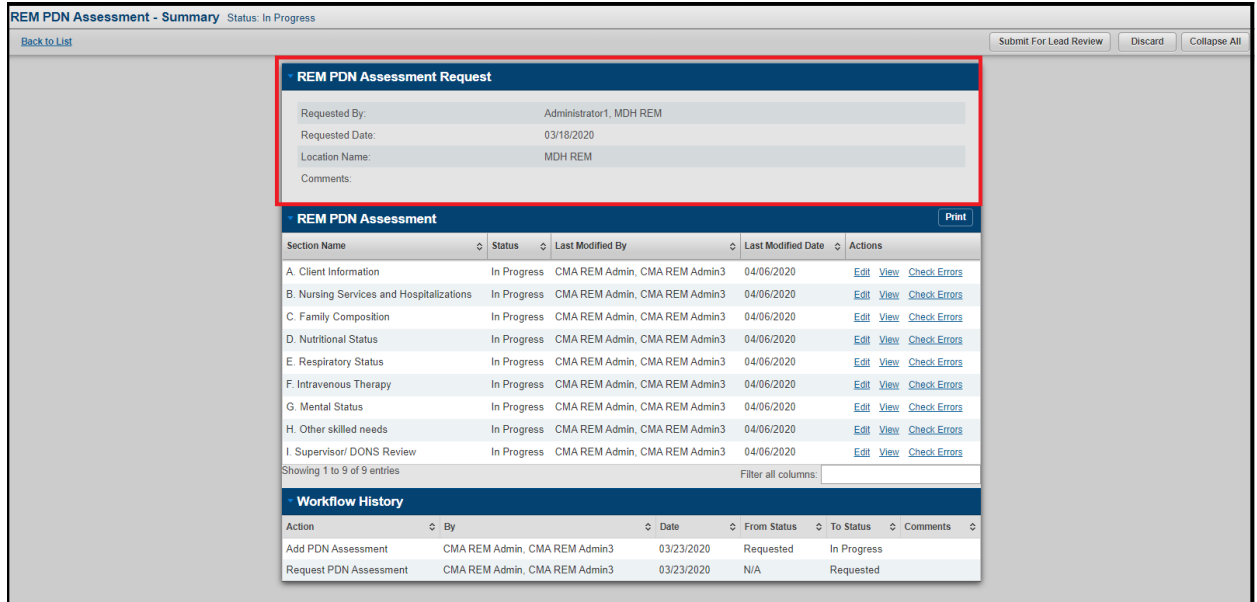
Client	PDN Type	Request Date	Requested By	PDN Assessment Completed By	Submit Date	Reviewer	Review Date	Status	Actions
REM1.1UAT Client201	Request	03/18/2020	Administrator1, MDH REM		N/A		N/A	In Progress	Summary
	Request	03/18/2020	Administrator1, MDH REM	Case Manager1, CMA REM	N/A		N/A	Discarded	Summary
	Request	03/18/2020	Administrator1, MDH REM		N/A		N/A	Discarded	Summary
	Request	03/18/2020	Administrator1, MDH REM		N/A		N/A	Discarded	Summary

30.4.1 View REM Assessment

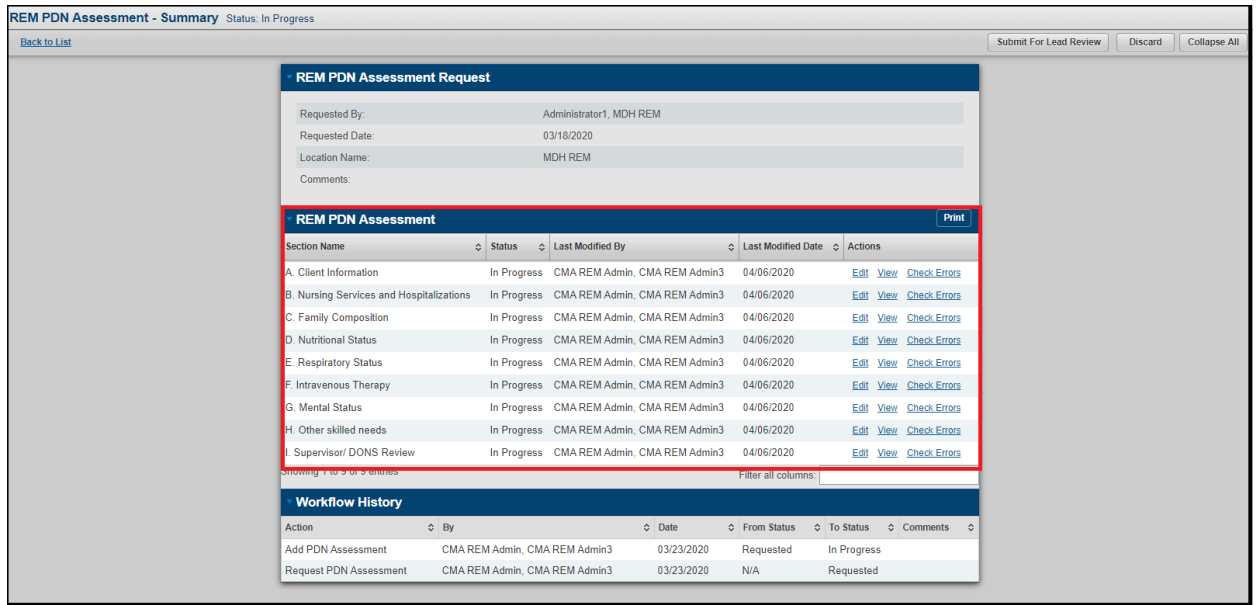
1. From the Client Profile, select the **Programs** banner on the left navigation.
2. Select **REM PDN Assessment**.
3. Select **Summary** hyperlink under the Actions column.

Client	PDN Type	Request Date	Requested By	PDN Assessment Completed By	Submit Date	Reviewer	Review Date	Status	Actions
REM1.1UAT Client201	Request	03/18/2020	Administrator1, MDH REM		N/A		N/A	In Progress	Summary
	Request	03/18/2020	Administrator1, MDH REM	Case Manager1, CMA REM	N/A		N/A	Discarded	Summary
	Request	03/18/2020	Administrator1, MDH REM		N/A		N/A	Discarded	Summary
	Request	03/18/2020	Administrator1, MDH REM		N/A		N/A	Discarded	Summary

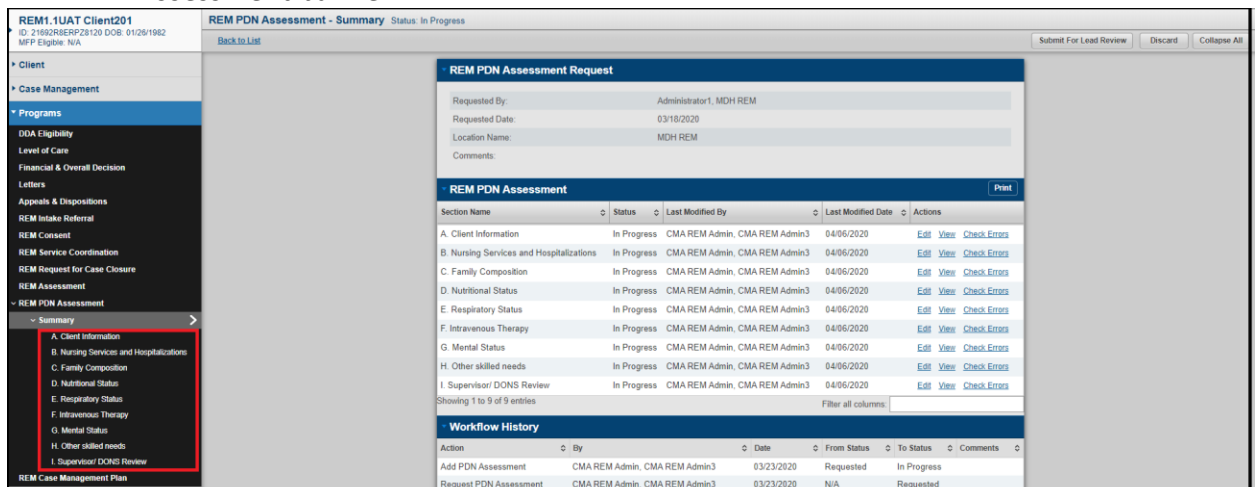
4. System displays **REM PDN Assessment – Summary** page in View mode.
5. REM PDN Assessment Request, REM Assessment and Workflow History Panels are displayed on the Summary Page.
6. These panels can be expanded or collapsed.
 - **REM PDN Assessment Request** Panel only displays if a Request was made to complete a REM PDN Assessment.
 - The request panel displays info related to the request such as the username who made the request, date when the request was made, location of the user who requested and comments added while requesting.



- **REM PDN Assessment** Panel displays the List of all the nine sections (Section A – Section I) in the list page. REM PDN Assessment panel displays the following fields against each section:
 - Section Name – Name of the section
 - Status – Status of the Section; Incomplete, In Progress, Complete
 - Incomplete: Section hasn’t been started yet
 - In Progress: Section started but not complete
 - Complete: All the required fields in the section Complete
 - Last Modified By – Person who last saved the section
 - Last Modified Date - Date when the section was last saved
 - Actions - Start, Edit, Check Errors, View
 - Start: start editing a section that is in Incomplete status.
 - Edit: start editing a section that is in In Progress or Complete Status
 - Check Errors: Highlights the missing fields in an In-Progress section.
 - View: To view the section in read-only mode.



7. Users can also navigate through various sections from Left Navigation bar under REM PDN Assessment banner.

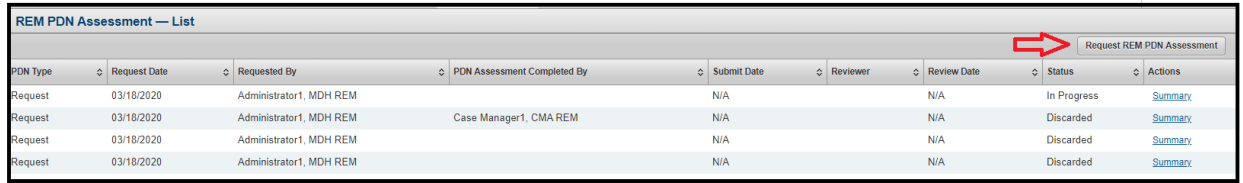


30.5 Request REM PDN Assessment

Request to add and complete a REM PDN Assessment can be made by MDH at any given time. A request can only be added if there is an actively assigned REM CMA (which is not MDH).

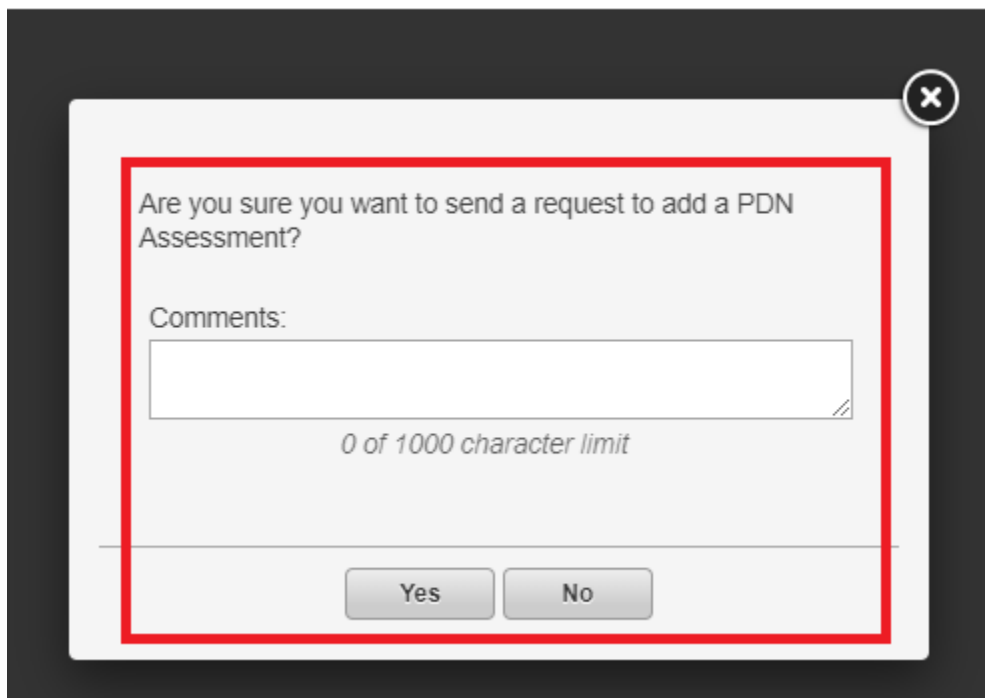
1. Select **Clients** tab, Enter Client search criteria and Click **Cases**.
2. From the search results list, select **Client Summary** hyperlink
3. From the Client Profile, select the **Programs** banner on the left navigation.

4. Select **REM PDN Assessment**.
5. System will navigate the user to the REM PDN Assessment-List page.
6. **Select Request REM PDN Assessment** button displayed on top right corner of the List page.

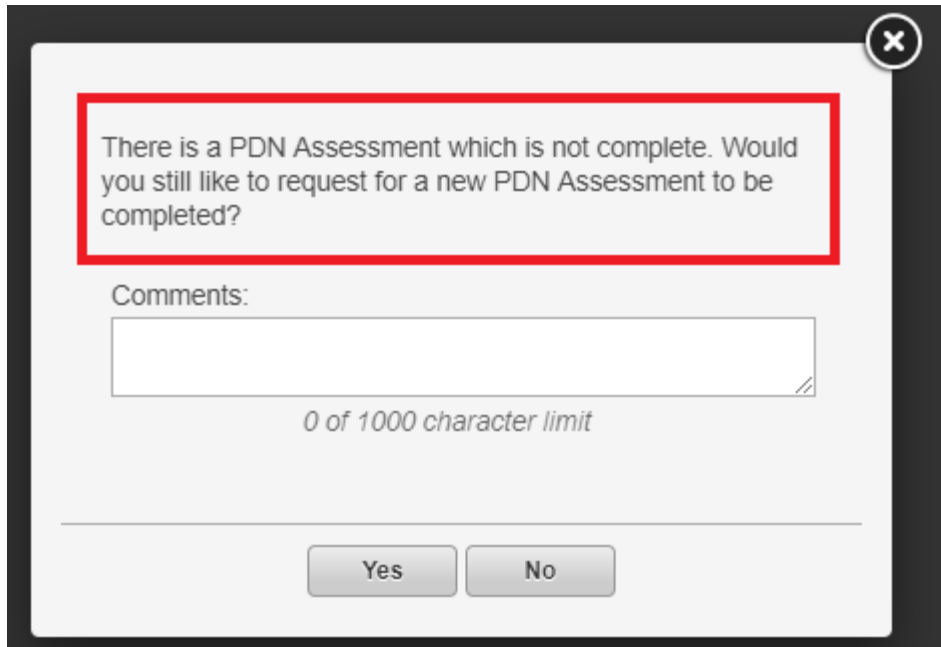


PDN Type	Request Date	Requested By	PDN Assessment Completed By	Submit Date	Reviewer	Review Date	Status	Actions
Request	03/18/2020	Administrator1, MDH REM		N/A		N/A	In Progress	Summary
Request	03/18/2020	Administrator1, MDH REM	Case Manager1, CMA REM	N/A		N/A	Discarded	Summary
Request	03/18/2020	Administrator1, MDH REM		N/A		N/A	Discarded	Summary
Request	03/18/2020	Administrator1, MDH REM		N/A		N/A	Discarded	Summary

7. A confirmation box will display, confirming the request. Enter Comments if any and Select Yes. The status will change to Requested and an Alert will be sent to the Assigned REM CMA Case Manager and the REM CMA Supervisor stating “A request has been added for your agency to complete PDN Assessment”



8. Given there is a REM PDN Assessment which is in the status of In-Progress, Pending Lead Review, and Clarification Requested, the Request confirmation box message will be different. The confirmation box message will state the following “There is a PDN Assessment which is not complete, would you still like to request for a new PDN Assessment to be completed?”



- The authorized users to edit can now navigate to the REM PDN Assessment Summary page for the requested REM PDN Assessment and click on the Start hyperlink for any of the sections to start working on the Assessment, the status will change from “Requested” to “In-Progress”

30.6 Add Initial REM PDN Assessment

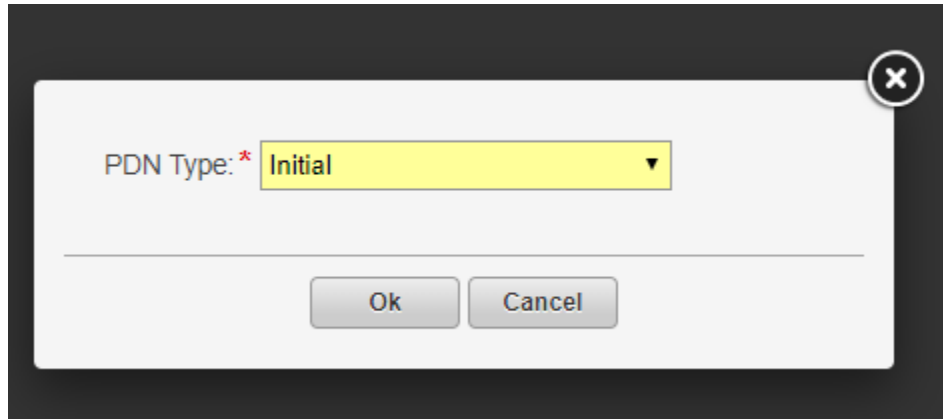
REM PDN Assessment can be added by CMA REM Case Manager, CMA REM Supervisor, and CMA REM Administrator. When adding a REM PDN Assessment for the first time, the user will only be able to select Initial PDN Assessment.

- Select **Clients** tab, Enter Client search criteria and Click **Cases**.
- From the search results list, select **Client Summary** hyperlink
- From the Client Profile, select the **Programs** banner on the left navigation.
- Select **REM PDN Assessment**.
- System will navigate the user to the REM PDN Assessment-List page.
- Select **Add** button displayed on top right corner of the List page.

REM PDN Assessment — List									
PDN Type	Request Date	Requested By	PDN Assessment Completed By	Submit Date	Reviewer	Review Date	Status	Actions	Add
Request	03/19/2020	Administrator1, MDH REM		N/A		N/A	Discarded	Summary	

- Select PDN Type as Initial and select Ok
 - Note: for the first time adding the system will only display Initial as an option.

- Given the user already has a REM PDN Assessment as Initial completed, upon adding the system will display PDN Type as Change in Services, Annual, Medicare.



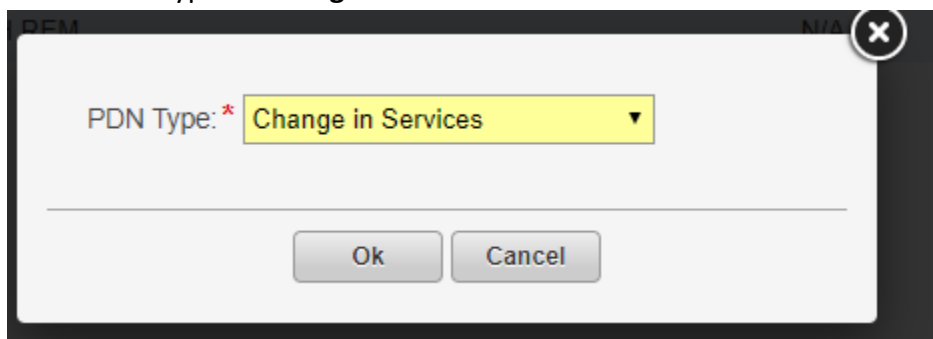
8. System will add an In-Progress REM PDN Assessment and navigate the user to the REM PDN Assessment-Summary page

30.6.1 Add Change in Services PDN Type

Given the client has a completed REM PDN Assessment with PDN type as Request or Initial, the user will be able Add Change in Services PDN Assessment.

Note: Change in Services PDN Assessment can be added anytime the client becomes eligible for Medicare, unless the client becomes eligible in December, January, June or July when the system allows the users to add Medicare PDN Assessment

1. Select **Clients** tab, Enter Client search criteria and Click **Cases**.
2. From the search results list, select **Client Summary** hyperlink
3. From the Client Profile, select the **Programs** banner on the left navigation.
4. Select **REM PDN Assessment**.
5. System will navigate the user to the REM PDN Assessment-List page.
6. **Select Add** button displayed on top right corner of the List page.
7. **Select** PDN Type as **Change in Services** and select **Ok**

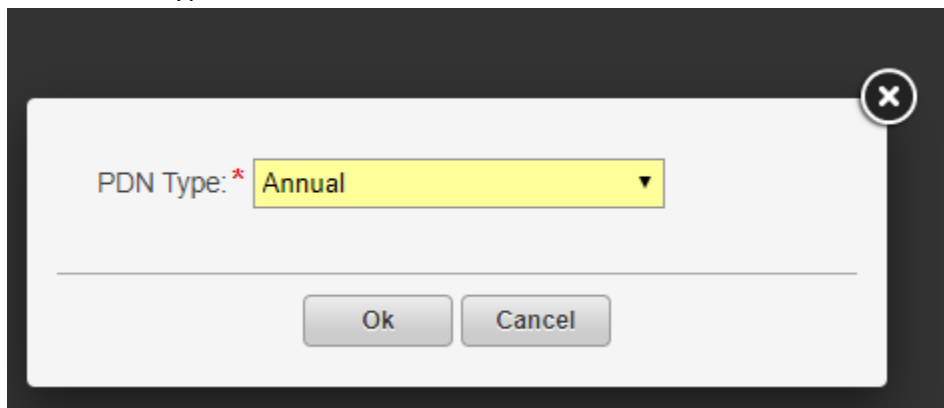


8. System will add an In-Progress REM PDN Assessment and navigate the user to the REM PDN Assessment-Summary page

30.6.2 Add Annual PDN Type

The Annual PDN Assessment can only be added once there is an Initial REM PDN Type completed and 315 days have passed from the latest completed REM PDN Assessment.

1. Select **Clients** tab, Enter Client search criteria and Click **Cases**.
2. From the search results list, select **Client Summary** hyperlink
3. From the Client Profile, select the **Programs** banner on the left navigation.
4. Select **REM PDN Assessment**.
5. System will navigate the user to the REM PDN Assessment-List page.
6. **Select Add** button displayed on top right corner of the List page.
7. **Select** PDN Type as **Annual** and select **Ok**

A screenshot of a software dialog box. The dialog box has a dark gray border and a white background. In the top right corner, there is a circular close button with a white 'X' on a dark background. The main content area contains the text 'PDN Type: *' followed by a yellow dropdown menu that currently displays 'Annual'. Below the dropdown menu is a horizontal line. At the bottom of the dialog box, there are two buttons: 'Ok' and 'Cancel', both with a light gray background and dark text.

8. System will add an In-Progress REM PDN Assessment and navigate the user to the REM PDN Assessment-Summary page

30.6.3 Add Medicare PDN Type

PDN type as Medicare can only be added once there is a REM PDN Type as Initial completed and Medicare PDN can be only added in the Month of “December, January, June and July”. if the system month is not equal to December, January, June or July and clicks Ok, the system will throw an error stating “Medicare PDN Type can only be added in December, January, June, and July.”

Note: Change in Services PDN Assessment can be added anytime the client becomes eligible for Medicare, unless the client becomes eligible in December, January, June or July when the system allows the users to add Medicare PDN Assessment

1. Select **Clients** tab, Enter Client search criteria and Click **Cases**.
1. From the search results list, select **Client Summary** hyperlink
2. From the Client Profile, select the **Programs** banner on the left navigation.
3. Select **REM PDN Assessment**.
4. System will navigate the user to the REM PDN Assessment-List page.
5. **Select Add** button displayed on top right corner of the List page.
6. **Select** PDN Type as **Medicare** and select **Ok**

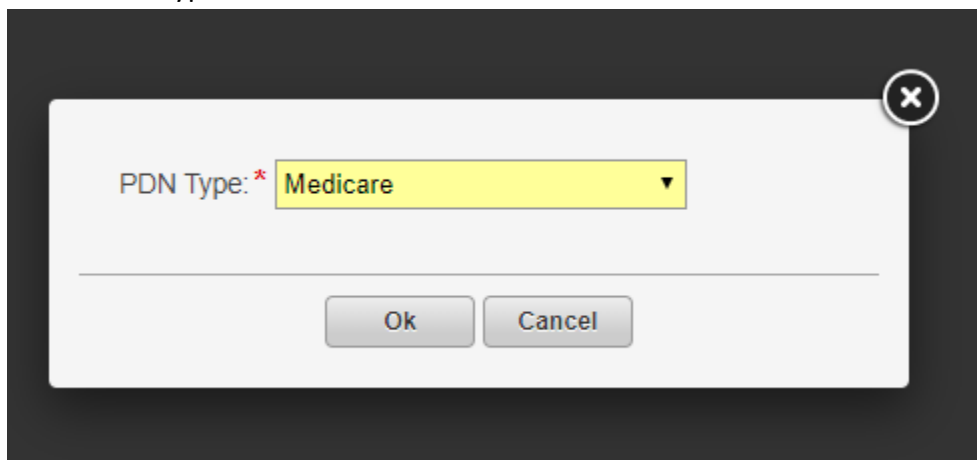


Figure 15 –PDN Type Medicare

7. System will add an In-Progress REM PDN Assessment and navigate the user to the REM PDN Assessment-Summary page

30.7 Start/Edit REM Assessment

The CMA REM Case Manager will complete the REM PDN Assessment, which includes **REM PDN Assessment sections** that are required to be completed before submitting the assessment.

30.7.1 Start/Edit REM PDN Assessment Sections

The REM Assessment contains **9 sections** that are required to be completed before submitting the REM Assessment.

List of Sections in the REM Assessment Panel


- A. Client Information
- B. Nursing Services and Hospitalizations
- C. Family Composition
- D. Nutritional Status

- E. Respiratory Status
- F. Intravenous Therapy
- G. Mental Status
- H. Other skilled needs
- I. Supervisor/ DONS Review

Note: All the sections have various required fields that the user will be required to fill out before submitting the assessment.

Common Functions available on REM PDN Assessment Panel:

- **Start**
 - Start hyperlink is available on the Actions column of REM PDN Assessment Panel.
 - This hyperlink is only available for the section in “Incomplete” status.
 - Upon use navigates the screen to the Edit page of that respective section.

REM PDN Assessment Print					
Section Name	Status	Last Modified By	Last Modified Date	Actions	
A. Client Information	Incomplete				Start
B. Nursing Services and Hospitalizations	Incomplete				Start
C. Family Composition	Incomplete				Start
D. Nutritional Status	Incomplete				Start
E. Respiratory Status	Incomplete				Start
F. Intravenous Therapy	Incomplete				Start
G. Mental Status	Incomplete				Start
H. Other skilled needs	Incomplete				Start
I. Supervisor/ DONS Review	Incomplete				Start

- **Edit**
 - Edit hyperlink is available on the Actions column of REM PDN Assessment Panel.
 - This hyperlink is only available for the section in “In Progress” status.
 - Upon use navigates the screen to the Edit page of that respective section.

REM PDN Assessment					Print
Section Name	Status	Last Modified By	Last Modified Date	Actions	
A. Client Information	In Progress	Administrator1, CMA REM	04/09/2020		Edit View Check Errors
B. Nursing Services and Hospitalizations	Incomplete				Start
C. Family Composition	Incomplete				Start
D. Nutritional Status	Incomplete				Start
E. Respiratory Status	Incomplete				Start
F. Intravenous Therapy	Incomplete				Start
G. Mental Status	Incomplete				Start
H. Other skilled needs	Incomplete				Start
I. Supervisor/ DONS Review	Incomplete				Start

Note: Fields denoted with ** asterisks indicates a field is required to submit Assessment.

- **Check Errors**
 - Check Errors hyperlink is available on the Actions column of REM PDN Assessment Panel.
 - This action is only available for the sections in “In Progress” status.

REM PDN Assessment					Print
Section Name	Status	Last Modified By	Last Modified Date	Actions	
A. Client Information	In Progress	Administrator1, CMA REM	04/09/2020		Edit View Check Errors
B. Nursing Services and Hospitalizations	Incomplete				Start
C. Family Composition	Incomplete				Start
D. Nutritional Status	Incomplete				Start
E. Respiratory Status	Incomplete				Start
F. Intravenous Therapy	Incomplete				Start
G. Mental Status	Incomplete				Start
H. Other skilled needs	Incomplete				Start
I. Supervisor/ DONS Review	Incomplete				Start

- Upon selection, system navigates the screen to the Edit page of that respective section and highlights the missing required fields in pink.

A. Client Information

1. Client Information

First Name:	LOC_Client9
Last Name:	Test
Middle Name:	
Suffix:	
Date of Birth:	10/28/1998
Current MA:	

2. How was the Client Contacted? ^{}**

Phone Call
 In Person Visit
 Other

2a. Phone Call Date ^{}**

3. Assigned REM Case Manager ^{}**

CMA REM Case Managor3

4. REM Case Manager Contact information

Phone Number: ^{**}	<input style="width: 60%;" type="text"/>
Ext:	<input style="width: 60%;" type="text"/>
Fax Number:	<input style="width: 60%;" type="text"/>

- **Back to Summary**
 - This hyperlink Saves any unsaved changes and navigates the page back to the REM PDN Assessment Summary Page

REM PDN Assessment

[Back to Summary](#)
[Cancel](#)

A. Client Information

1. Client Information

Common Actions available on a Section’s Edit Page:

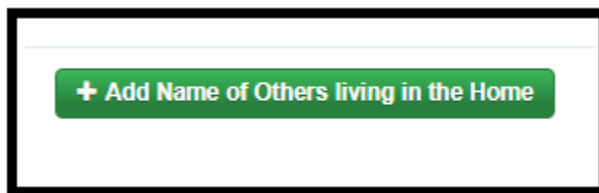
- **Save & Next**
 - This action will not be available in Section I.
 - Saves the section and navigates to the next section.
- **Save**
 - This action will be available for all the sections.
 - Saves the section and stays on the screen

- **Save & Previous:**
 - This action will not be available in Section A.
 - Saves the section and navigates to the Previous section.
- **Cancel** to ignore the changes

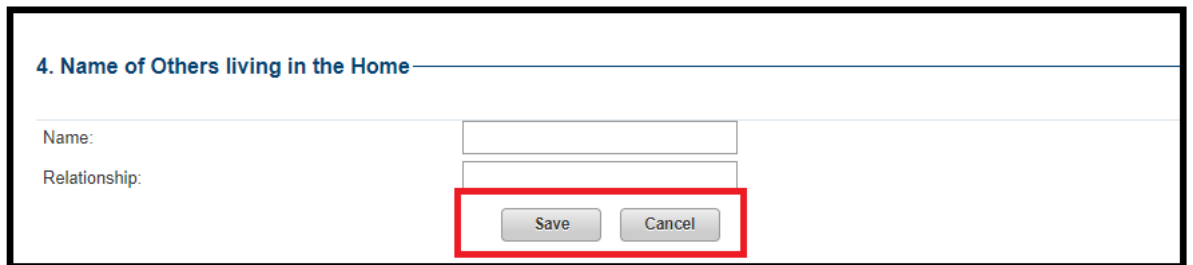


Common functions available on various Section’s Edit Page:

- **+ Add** buttons displayed in green



0. Adds rows in the table of various sections



1. **Save:** this save action populates the information in the table. And the data is displayed in the table.

Note: User must select table select to populate the information in the table and then use main save from the top right corner to save the populated information

2. **Cancel:** cancels the add row action and stays on the edit page of that section.
3. **Edit & Delete:** These hyperlinks will be available in the table. Edit will open the row for editing and delete will delete the respective row.

4. Name of Others living in the Home _____

[+ Add Name of Others living in the Home](#)

Name of Others living in the Home and relationship to participant _____

Name	Relationship	Actions
test test	Brother	Edit Delete

- **Search:** Provider search action will be available in section B Nursing Provider of the REM PDN Assessment.
0. Upon selection, system displays the Provider Search Pop-up Window for the user to select a provider from.

Provider Search

Provider Name: Provider Number: Provider Type: 53 - Pediatric Nursing/Home H ▾

County: ▾

Provider Name	Provider MA Number	Provider Address	Actions
JOHN THOMAS	001125800	540 RIVERSIDE DR., SUITE 3, SALISBURY, MD 21801	Select
CHESAPEAKE-POTOMAC HOME HEALTH AGEN	054660700	7627 LEONARDTOWN ROAD, HUGHESVILLE, MD 20637	Select
ASSISTED FLANIGAN CARE INC	067510500	4022 1/2 NORTH ROGERS AVE, SUITE C, BALTIMORE, MD 21207	Select
DEL-MAR-VA NURSES-ON-CALL	072943400	543 A RIVERSIDE DR, SALISBURY, MD 21801	Select
PEDS ROUND THE CLOCK INC	082902100	1708 W ROGERS AVENUE, BALTIMORE, MD 21209	Select
A TENDER TOUCH NURSING CARF	090601800	1707 JANUARY DRIVE, #302, SILVER SPRING, MD 20904	Select

Showing 1 to 200 of 712 entries Filter all columns:

1. Upon selecting a Provider from Provider Search Window, system pre-populates the relevant information in the Section fields.

2. Nursing Providers

Provider Name: ** JOHN THOMAS

Provider Number: ** 001125800

Address: 540 RIVERSIDE DR., SUITE 3, SALISBURY, MD 21801

Funding Source: ** tes

Current Frequency of Services: ⓘ ** 1

Assessment of Services: ** tes

Change of Service to: ⓘ ** test

Nursing Services in School: ** test

2. Upon clicking on Table **Save**, system populates the information entered to the table.

Nursing Providers								
Provider Name	Provider Number	Address	Funding Source	Current Frequency of Services	Assessment of Services	Change of Service to	Nursing Services in School	Actions
JOHN THOMAS	001125800	540 RIVERSIDE DR., SUITE 3, SALISBURY, MD 21801	tes	1	tes	test	test	Edit Delete

Section A to H

1. Click on the Start hyperlink of Section A Client Information
2. System will navigate the user to the Section A edit page
3. Enter values for all the fields
4. Click Save & Next
5. Complete remaining sections by entering values and clicking on Save and Next thru section H.

Section I. Supervisor/DONS Review

Use the following steps to continue editing REM PDN Assessment section I:

1. Select **Start** hyperlink under the Actions column to open Section I in Edit mode.
2. Edit the field entries/selections, including all required fields denoted with asterisks **.

3. Select a reviewer from the drop-down and click on Save

The screenshot shows the 'REM PDN Assessment' form. The main section is titled '1. Supervisor/ DONS Review'. Underneath, there are two sub-sections: '1. Supervisor Review' and '2. DONS Review'. In the 'Supervisor Review' section, the 'Date Assessment submitted for Lead Review' field is followed by a dropdown menu labeled 'Select a Reviewer'. This dropdown menu is highlighted with a red rectangular box. Other fields include 'Assessment Completed By', 'Date Review Completed', and 'Review Completed By'. The 'DONS Review' section includes 'Reviewed By' and 'Reviewed On' fields. At the bottom, there is a '3. Section I. Comments' section with a text area.

NOTE: The **Select a Reviewer** list is pre-populated with the names of all the CMA REM Supervisors from the assigned CM Agency.

30.7.2 Submit REM PDN Assessment for Lead Review

Once all the sections of the REM PDN Assessment are complete, Submit the REM PDN Assessment for Lead Review

Use the following steps to Submit the completed REM PDN Assessment for review:

1. From the REM PDN Assessment Summary, Select **Submit for Lead Review**.

The screenshot shows the header of the 'REM PDN Assessment - Summary' page. The status is 'In Progress'. On the right side of the header, there are three buttons: 'Submit For Lead Review', 'Discard', and 'Collapse All'. The 'Submit For Lead Review' button is highlighted with a red rectangular box.

2. The **REM PDN Assessment Summary** displays status as **Pending Lead Review**. Select **Back to List** to display the REM Assessment List view.

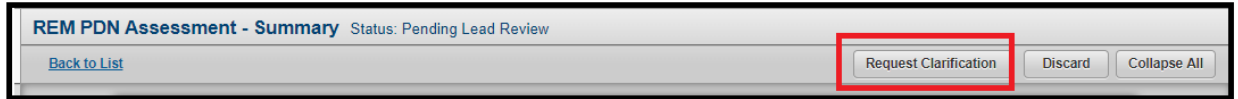
The screenshot shows the header of the 'REM PDN Assessment - Summary' page. The status is 'Pending Lead Review'. Below the status, there is a 'Back to List' link. The status text 'Status: Pending Lead Review' is highlighted with a red rectangular box.

3. The **REM PDN Assessment List** view also displays status as Pending Lead Review.
4. An Alert is sent to the REM CMA Supervisor stating “A PDN Assessment has been submitted for your review”.
5. REM Admin and REM Supervisor can edit the REM PDN Assessment in the status of Pending Lead Review.

30.7.3 Request Clarification while in Pending Lead Review Status

The Clarification Request option is available if needed. CMA can use this to ask additional questions or update the Assessment. When requesting clarification an Alert is sent to the Assigned REM CM.

1. From the REM PDN Assessment Summary, Select **Request Clarification** button.



2. Confirmation box is displayed confirming the request, enter comments if any and select Yes.
3. The REM PDN Assessment Summary displays Status Clarification Requested. Select Back to List to display the REM Assessment List view.
4. The REM PDN Assessment List view also displays the Clarification Requested status.
5. An Alert is sent to the REM CMA CM stating “Clarification has been Requested for a REM PDN Assessment”.
6. REM CM, REM Admin and REM Supervisor can edit the REM PDN Assessment in the status of Pending Lead Review.
7. Once the changes have been made the REM CM, select Submit **for Lead Review** button and the status changes to “Pending Lead Review”

30.7.4 Discard REM Assessment

The Discard option is available if needed, for only the following statuses of the REM PDN Assessment: Requested, In Progress, Pending Lead Review and Clarification Requested.

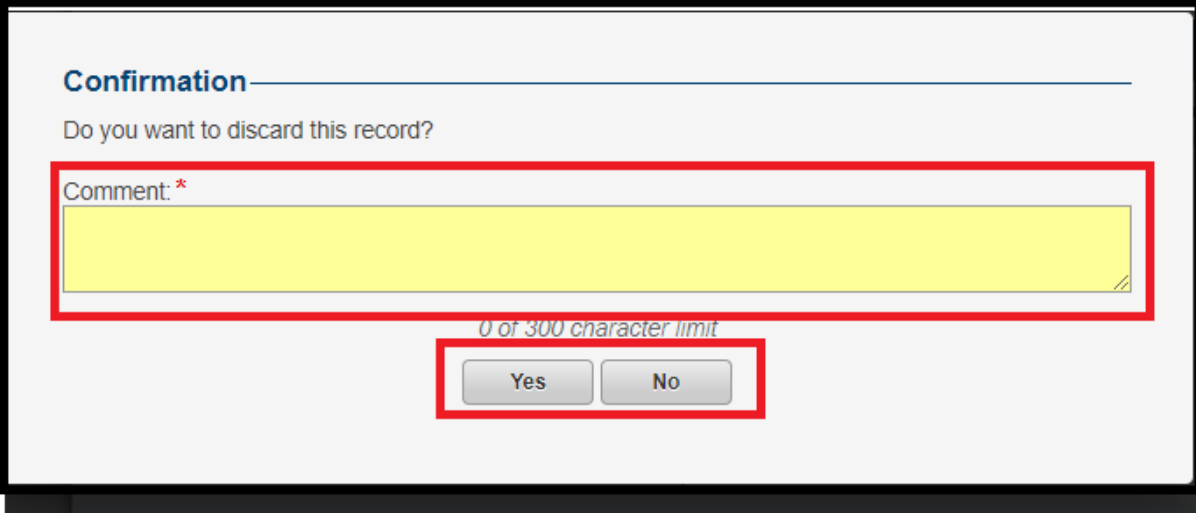
Note:

Use the following steps to **Discard** a REM Assessment:

1. From the REM PDN Assessment Summary, Select **Discard**.



2. Enter the required comment, Select **Yes** to confirm the REM PDN Assessment **Discard**.



The image shows a confirmation dialog box with the following elements:

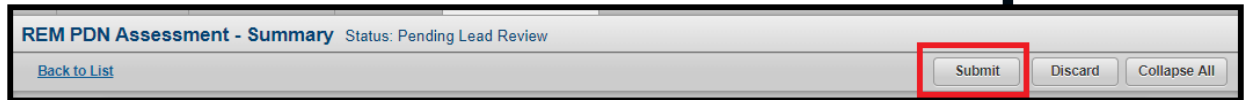
- Confirmation** header.
- Question: "Do you want to discard this record?"
- A text input field labeled "Comment: *" with a yellow background, enclosed in a red border. Below the field is the text "0 of 300 character limit".
- Two buttons: "Yes" and "No", both enclosed in a red border.

3. The REM Assessment List displays the Discard status.
NOTE: If an **Info-Tip** icon displays, click on the icon to view the Info-Tip details/comments.
4. When Discarding a Requested REM PDN Assessment (by DONS Nurse or MDH REM Admin) an Alert is sent to assigned REM CM and REM CMA Supervisor stating, "The request for the PDN Assessment has been discarded."
Note: When Discarding a requested REM PDN Assessment in the status of "In-Progress", "Clarification Requested" and "Pending Lead Review". System Discards that PDN Assessments and adds a new PDN Assessment request and an info box is displayed stating "Info: As this REM PDN Assessment was requested, a new Request for PDN Assessment has been added. Please complete the Requested REM PDN Assessment"
5. When Discarding a REM PDN Assessment in Clarification Requested status an Alert is sent to the Assigned CM and the REM CMA Supervisor "The PDN Assessment which was in Clarification requested status has been discarded."
6. When Discarding a REM PDN Assessment in Pending Lead Review status an Alert is sent to the assigned CM stating "The PDN Assessment which you submitted for Lead Review has been discarded."

30.8 Submit REM PDN Assessment

REM PDN Assessment can be submitted to DONS, while in the status of Pending Lead Review.

1. From the REM PDN Assessment Summary, Select **Submit** button.

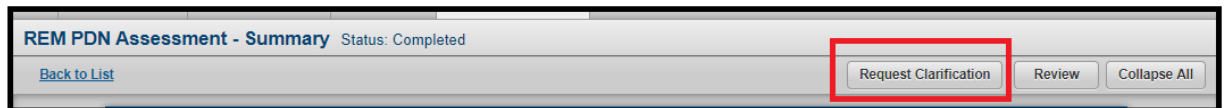


2. Confirmation Box is displayed confirming the request to Submit, select Yes
3. The REM PDN Assessment Summary displays Status Completed. Select Back to List to display the REM PDN Assessment List view.
4. The REM PDN Assessment List view also displays the Completed status.
5. An Alert is sent to MDH DONS Nurse advising that a REM PDN Assessment has been submitted.
6. Once the status changes to Completed, no changes can be made to the PDN Assessment.

30.9 Request Clarification while in Completed Status

MDH DONS Nurse can request clarification if while the status is in Completed.

1. From the REM PDN Assessment Summary, Select **Submit** button.

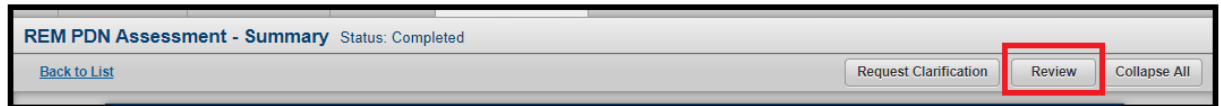


2. Confirmation Box is displayed confirming the request to Request clarification, enter comments and select Yes
3. The REM PDN Assessment Summary displays Status Completed- Clarification Requested. Select Back to List to display the REM PDN Assessment List view.
4. The REM PDN Assessment List view also displays the Completed- Clarification Requested status.
5. An Alert is sent to REM CMA Supervisor and REM CMA Admin, informing about an PDN Assessment pending clarification.
6. To respond back REM CMA Supervisor, clicks on the Submit button which displays a confirmation box with comments text box as required field. Enter values in the comments box and select Yes.
7. Status changes to Completed

30.10 Review REM PDN Assessment

There is an option for REM DONS Nurse to mark a REM PDN Assessment as Reviewed.

1. From the REM PDN Assessment Summary, Select **Review** button.



2. Confirmation Box is displayed confirming the request, select **Yes**
3. The REM PDN Assessment Summary displays Status as Reviewed. Select Back to List to display the REM PDN Assessment List view.
4. The REM PDN Assessment List view also displays the Reviewed status.

30.11 Pre-populate REM PDN Assessment

System pre-populates the newly added or requested REM PDN Assessment from the latest Completed Assessment, and it also displays a confirmation in every section for the user to confirm whether the pre-populated fields are correct.

1. Navigate to the REM PDN Assessment- List page
2. Navigate to the REM PDN Assessment -Summary page
3. Select the Start/Edit hyperlink for any section
4. Under each section all the fields will be pre-populated, except the fields that get populated when the status changes to fields that get populated from Client Summary etc.
5. A question stating, "I have verified that the pre-populated fields are correct?" with options as Yes and No will be displayed.
6. If you select No, Explain No will be displayed.

30.12 Print REM PDN Assessment

The REM PDN Assessment can be printed in two different formats:

Version 1: When the status is not Completed or Discarded, all the options under each question will display.

Version 2: When the status is Completed or Discarded, only the options selected and or values entered will display.

1. From the REM PDN Assessment Summary, Select **Print** button, displayed on the REM PDN Assessment panel.

REM PDN Assessment					Print
Section Name	Status	Last Modified By	Last Modified Date	Actions	
A. Client Information	Incomplete			Start	
B. Nursing Services and Hospitalizations	In Progress	Long, Carmella	04/06/2020	Edit View Check Errors	
C. Family Composition	Incomplete			Start	
D. Nutritional Status	Incomplete			Start	
E. Respiratory Status	Incomplete			Start	
F. Intravenous Therapy	Incomplete			Start	
G. Mental Status	Incomplete			Start	
H. Other skilled needs	Incomplete			Start	
I. Supervisor/ DONS Review	Incomplete			Start	

Showing 1 to 9 of 9 entries Filter all columns

2. System will create a printable version of the PDN Assessment.

30.13 Workflow History panel

The workflow history panel provides information on the selected REM PDN Assessment. Such as the date when the status changed, who initiated the status change, comments entered, etc.

1. From the REM PDN Assessment Summary, Expand the Workflow History panel.

Workflow History						
Action	By	Date	From Status	To Status	Comments	
Add PDN Assessment	Acosta, Mark	04/03/2020	Requested	In Progress		
Request PDN Assessment	Michael, Glinna	04/03/2020	N/A	Requested	test	

31 REM PDN Assessment My List

The following REM PDN Assessment My List are available in the MY List module.

1. **All Clients with Requested REM PDN Assessments** - All the REM PDN Assessments which were Requested (PDN Type as Request) and are in any one of the following statuses will display in this report "Requested" "In-Progress" "Clarification Requested" "Pending Lead Review". Once the status changes to Completed or Discarded the client will be removed from this My List.

Users:

MDH REM Admin, REM Intake Nurse MDH DONS NURSE, MDH DONS ADMINISTRATOR

REM CMA Admin and REM CMA Supervisor - for clients assigned to their agency

2. **My Clients with Requested REM PDN Assessments** - All the REM PDN Assessments which are in the status of Requested for clients assigned to that CM will display in this My List. Once the status changes to anything else other than Requested client should be removed from this My List.

User:

REM CMA Case Manager - for clients assigned to them

3. **All Clients with In-Progress REM PDN Assessments** - All the REM PDN assessments in the status of "In-Progress" will display in this My list. Once the status changes from In-Progress to anything else the client will be removed from this My List.

Users:

MDH REM Admin, REM CMA Admin and REM CMA Supervisor - For all the clients assigned to their agency

4. **My Clients with In-Progress REM PDN Assessments** -All the REM PDN assessments in the status of "In-Progress" for the clients assigned to me, will display in this My list. Once the status changes from In-Progress to anything else the client will be removed from this My List.

Users:

REM CMA Case Manager- for clients assigned to them

5. **All Clients with Pending Lead Review REM PDN Assessments**- All the REM PDN assessments in the status of "Pending Lead Review" will display in this my list. Once the status changes from Pending Lead Review to anything else the client will be removed from this My List.

Users:

MDH REM Admin, REM CMA Admin and REM CMA Supervisor - For all the clients assigned to their agency

- 6. My Clients with Pending Lead Review REM PDN Assessments** - All the REM PDN assessment in the status of "Pending Lead Review" and are in the supervisor's queue and pending Lead Review (this is for the REM CMA Supervisor role) or for clients assigned to them will display in this my list. Once the status changes from Pending Lead Review to anything else the client will be removed from this My List.

Users:

REM CMA Supervisor - All the PDN Assessments that are in this supervisor's queue and pending Lead Review and **REM CMA CM** For clients assigned to them

- 7. All Clients with Pending Clarification REM PDN Assessments**-All the REM PDN assessments in the status of **Completed - Clarification Requested** or **Clarification Requested** will display in this My List. Once the status changes the client will be removed from this My List.

Users:

MDH REM Admin, REM CMA Admin and REM CMA Supervisor - For clients assigned to their agency will see clients with REM PDN Assessment in status of Clarification Requested, Completed - Clarification Requested **DONS Nurse, MDH DONS Administrator** - will see clients with REM PDN Assessment in status of Completed - Clarification Requested

- 8. My Clients with Pending Clarification REM PDN Assessments** - All the REM PDN assessments in the status of Completed - Clarification Requested or Clarification Requested will display in this My List. Once the status changes the client will be removed from this My List.

Users:

REM CMA Case Manager - will see all the clients assigned to them and are in the status of Clarification Requested or Completed - Clarification Requested

REM CMA Supervisor - will see all the clients who are in the status of Completed- Clarification Requested. Only for the clients for who that supervisor submitted the PDN Assent (changed the status to Completed)

- 9. All Clients with REM PDN Assessments Due** - All Clients with PDN Assessments Due, select Type field and Days due field will see all the PDN assessments with type as Annual and or Medicare that are due.

Users:

MDH DONS Nurse, MDH DONS Administrator, MDH REM Admin, REM CMA Admin and REM CMA Supervisor - For clients assigned to their agency

Medicare- PDN assessments are due every six months. System only allows the users to add a Medicare PDN during the following months December, January, June and July. clients are populated in the due My list starting Dec 1st until Jan 31st and June 1st to July 31st.

Logic for clients to be removed from Medicare Due My List:

1. If an assessment with PDN type as Medicare is added and completed within Dec 1st to Jan 31st and June 1st to July 31st then be removed from that client from this my list.
2. If that assessment is not completed within the time frame it will fall out of the Due My List and will be listed under overdue my list
3. if the client gets disenrolled from REM, be removed from the client from this My List.
4. Clients will only show in the Due my list if there is another Medicare PDN Added and completed, first. Clients will only show in the Due my list if the latest completed PDN assessment is Medicare between Medicare and Annual (code will only look for Medicare or Annual, if there is Change in Services or Request PDN added in the middle system will disregard that and look for latest between Medicare and Annual) . If the Latest completed PDN Assessment Between Medicare and Annual is Annual, then the client will not show up in Due

Annual –PDN assessments are due 365 days from the date when the most recent PDN Type as Initial, Annual, Medicare, Request or Change in Services which ever one is completed recently. Display clients due within 50 days (the system will display them as due starting the 315th day after the submission of the last annual/initial assessment).

Logic for clients to be removed from Annual Due My List:

1. If an Assessment with PDN type as Annual is added and completed by Due Date (which is 365 days from the latest PDN) then be removed from the client from this My List.
2. If the user doesn't add and complete a PDN type as Annual by Due date (which is 365 days from the latest PDN), once overdue be removed from them from this My list and will show in overdue
3. if the client gets disenrolled from REM be removed from the client from this My List.

10. My Clients with REM PDN Assessments Due - All Clients with PDN Assessments Due, select Type field and Days due field I will see all the PDN assessments with type as Annual and or Medicare that are due for clients assigned to me.

Users:

REM CMA Case Manager - For clients assigned to them

11. All Clients with REM PDN Assessments Overdue - will see all the PDN assessments Annual and or Medicare that are overdue, which were not completed on time.

Users:

MDH DONS Nurse, MDH DONS Administrator, MDH REM Admin, REM CMA Admin and REM CMA Supervisor - For clients assigned to their agency

Medicare- Medicare- PDN assessments are due by end of Jan and end of July every year every six months. System only allows the users to add a Medicare PDN during the following months December, January, June and July. Show clients in the overdue list starting Feb 1st and August 1st ^{lf} there was no PDN type as Medicare completed (status Completed) by 01/31/YYYY or 07/31/yyyy then show the clients in the overdue my list.

Logic for clients to be removed from Overdue Medicare My List:

1. If an assessment with PDN type as Medicare is added and completed, then be removed from that client from this my list.
2. if the client gets disenrolled from REM be removed from the client from this My List.
3. If there was an Annual PDN type added and completed for clients overdue for Medicare PDN, then be removed from that client from this My List.
4. In a scenario when the user didn't add a Medicare PDN Type for Jan and was placed in overdue, now its July and the user still doesn't add a PDN type as Medicare, which means clients missed adding Medicare PDN twice, they will show up twice, the clients will be removed from if Annual PDN is added and completed or client gets disenrolled from REM or user adds and completes a PDN as Medicare.

Annual –PDN assessments are due 365 days from the date when the most recent PDN Type as Initial, Annual, Medicare, Request or Change in services which ever one is submitted recently. The system will display clients as overdue starting 366th day if there was no PDN with Type as Annual completed.

Logic for clients to be removed from overdue Annual My List:

1. If an Assessment with PDN type as Annual is Completed, then be removed from them from this my list
2. If the client gets disenrolled from REM, then be removed from them from this my list

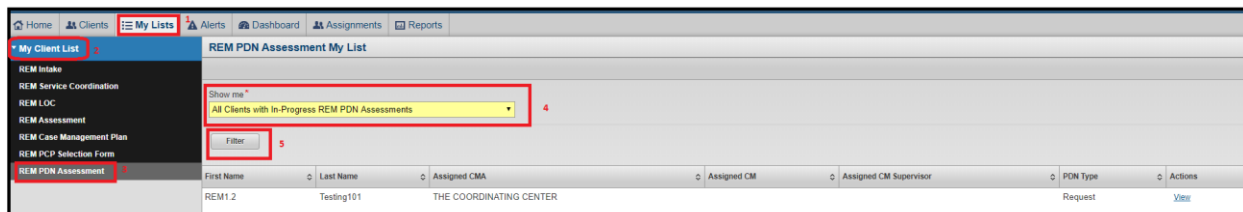
12. My Clients with REM PDN Assessments Overdue - will see all the PDN assessments Annual and or Medicare that are overdue, which were not completed on time for clients assigned to me.

Users:

REM CMA CM - For clients assigned to the CM

13. Follow the below steps to navigate to the REM PDN Assessment My List page

1. Select the **My List** tab, displayed next to the Clients tab
2. From the left Nav, expand the My Client List
3. Select REM PDN Assessment
4. System will navigate the user to the REM PDN Assessment- My List page
5. From the Show Me drop-down, select any of the MY Lists, that you will like to view
6. Select the Filter button
7. System will display all the results; View hyperlink will navigate the user to the associated REM PDN Assessment.



32 REM PDN Assessment Activities

New activities have been added to indicate of the clients receiving or not receiving PDN Services.

- **Activity on Going:** Select this activity if the client is already receiving PDN Services
- **Activity Starting:** Select this activity if the client has started receiving PDN Services
- **Activity Terminated:** Select this activity if the client's PDN Services have been Terminated
- **Activity Denied:** Select this activity if the client's PDN Services have been Denied.

Note: When any of the above-mentioned Activities are selected in the REM Activities module, the only option that will display for the **"With" field** is **Client/Family** and **"Type" field** is **PDN Services**

1. Navigate to the client profile, expand the Case Management from left Nav and select REM Activities
2. Click on the Add button
3. Select Actions as any one of the following: Starting, On Going, Terminated and Denied
4. Select With field as Client/Family
5. Select Type field as PDN Services
6. Save the Activity

33 REM PDN Assessment Activity Report

Allows the user to run a REM PDN Activity report by selecting different input filters.

1. Select the Reports Tab
2. Select REM
3. Select REM PDN Activity report
4. Enter Start date
5. End date will pre-populate as system date and is editable
6. Select Activity for PDN Service from the drop-down
7. Click Filter

System will display all the clients that had a selected activity added during the selected time frame.