Level of Care Eligibility Review (LOCER)
User Guide

June 2003

For internal use by the Department of Medical Assistance Services

In compliance with HIPAA regulations, this user guide does not show PHI.

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About Level of Care Eligibility Review (LOCER)

The Level of Care eligibility Review Instrument system (LOCER) enables DMAS's LTC & QA department to automatically check whether or not a Recipient is still eligible for the E&D, CD-PAS, or AIDS waiver program. Users of LOCER simply enter Recipient information and click a button that makes an immediate eligibility determination of "yes" or "no".

Business process events leading up to the eligibility check are generally as follows:

1. DMAS LTC & QA department send the assessment documents to selected Providers every month;

2. The Providers send to DMAS the filled-out, condensed Recipient LOC form or LOCER form;

3. Using the LOCER login screen, an authorized user accesses the system to process the form;

4. The user enters the Recipient's information using various LOCER screens;

5. LOCER automatically calculates the Recipient's eligibility (expressed as a "yes" or "no") for the selected waiver program and display whether or not the Recipient is still eligible;

6. The authorized user (administrator) may choose to override the review outcome, providing a brief explanation;

7. As needed, the LOCER user sends different types of letters to Providers, Recipients, and WVMI. The LOCER user then uses LOCER to track what has been sent.

About This Manual

This user guide addresses tasks in the general order of the business process associated with the "Level of Care Eligibility Review Instrument" form. See the table of contents for a list of those tasks and the order in which they are described.

If you are new to LOCER, you should begin with the "Getting Started" section and proceed from there to the "Determining if a Recipient Already Exists" section.

The User Interface

The user interface includes menus, toolbar icons, buttons, and fields. Toolbar icons have the meanings indicated below.

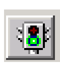
Toolbar Icons


Insert Record – Allows you to work with a new, blank screen for adding a new record.

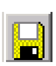

Clear Record – Clears the screen. (It does NOT delete a record.)


Remove Record – Deletes a blank record when a blank record was added accidentally using the Insert Record icon or the Next Record arrow button. Cannot be used to delete an existing record.


Query Mode – Puts LOCER in “query mode” so that you can search on a specific piece of information.


Execute Query – Tells LOCER to find any records that have the search criteria you entered, or it tells LOCER to retrieve all records in any order if you have not entered a search criterion.


Cancel Query – Cancels Query Mode. This icon is active only when the system has been put in Query Mode by way of the Query Mode icon or the “Enter” option under the Query menu.


Save – Saves any new or updated information.


Print – Does a print capture of the current screen and prints it.


Exit – Exits the current screen and returns to the most recently used screen.

Using "Find" Fields

"Find" fields appear in several places in LOCER to allow you to find a value in a list without having to scroll through the entire list.

If you are not sure what information to supply in a "Find" field, refer to Appendix A.

Getting Started

There are two things you need to do to get started with the LOCER system:

1. Have the "Level of Care Eligibility Review Instrument" form handy;

2. Log into LOCER by doing the following:

- Double-click the LOCER icon on your Desktop.
- Fill in the login fields shown in Figure 1 below:

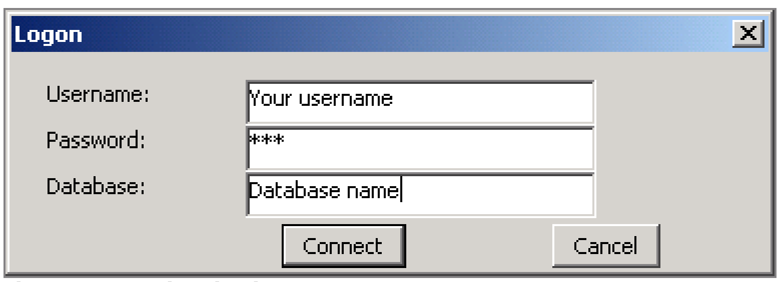


Figure 1. Login Fields.

- Click the Connect button to go to the Recipient Search Form (shown in Figure 2 below).

After logging in, you must verify that the Recipient exists in the LOCER system. If the Recipient does not exist in the system, you must add him or her. If the Recipient does exist, you may need to update some of the information from the Recipient Proceed to the "Determining if a Recipient Already Exists" section below.

Figure 2. Recipient Search Form.

Determining if a Recipient Already Exists

You must determine whether or not a Recipient already exists in the LOCER system when you begin to process his or her "Level of Care Eligibility Review Instrument" form.

You can use one of three pieces of information to see if the Recipient already exists: Medicaid Number, SSN, or Last Name. You only need to search by <u>one</u> of these at any given time.

Searching by Medicaid No

Do the following to search for a Recipient by Medicaid Number:

- First, <u>**do not**</u> delete the "%" sign in the "Medicaid No" field (shown above in Figure 2).
- <u>**In front of**</u> the "%" sign type part of the Recipient's Medicaid Number (two or three digits should be enough).

> ✐ *<u>NOTE:</u> The "%" sign is known as a "wildcard". It stands in place of one or more characters in a database search. That is why you are able to find Recipients by entering only part of their Medicaid Numbers, along with the "%" sign. (See Appendix A, "Using the % Sign with Find Field Searches", for additional information.)*

- Click the Search button. (Doing this will return all Recipients whose Medicaid Numbers start with the two or three digits you entered in the step above.)
- If the Recipient's name appears at the bottom of the screen, proceed to the "Updating Recipient Information" section below. If the Recipient <u>**does not**</u> appear, proceed to the "Adding a New Recipient" section below.

Searching by SSN

Do the following to search for a Recipient by SSN:

- Delete the "%" sign from the "Medicaid No" field (shown in Figure 2 above).
- Type the whole SSN (without dashes) in the "SSN" field.
- Click the Search button.
- If the Recipient's name appears at the bottom of the screen, proceed to the "Updating Recipient Information" section below. If the Recipient <u>**does not**</u> appear, proceed to the "Adding a New Recipient" section below.

Searching by Last Name

- Delete the "%" sign from the "Medicaid No" field (shown in Figure 2 above).
- Type the last name in the "Last Name" field. (Use an initial capital and then lower-case letters, as in "Robertson".)
- Click the Search button.
- If the Recipient's name appears at the bottom of the screen, proceed to the "Updating Recipient Information" section below. If the Recipient **does not** appear, proceed to the "Adding a New Recipient" section below.

Updating Recipient Information

The method for updating Recipient information depends on whether you found the Recipient in the system or you (or someone else) added that Recipient using the "Adding a Missing Recipient" section of this guide.

Follow the appropriate instructions below depending on whether the Recipient was found or added; but first, read below to learn how to tell if a Recipient was found or added.

Distinguishing "Found" from "Added" Recipients

To distinguish between a "found" Recipient and a Recipient that was added because it was missing, look at the "Manual Add" indicator on the Recipient form (shown in Figure 2a. below). If the indicator is "Y", then the Recipient was added manually because it was missing. If the indicator is "N", then you can consider that Recipient "found in LOCER" and proceed with the instructions directly below this sentence. (Instructions for updating manually added Recipients appear below the section below.)

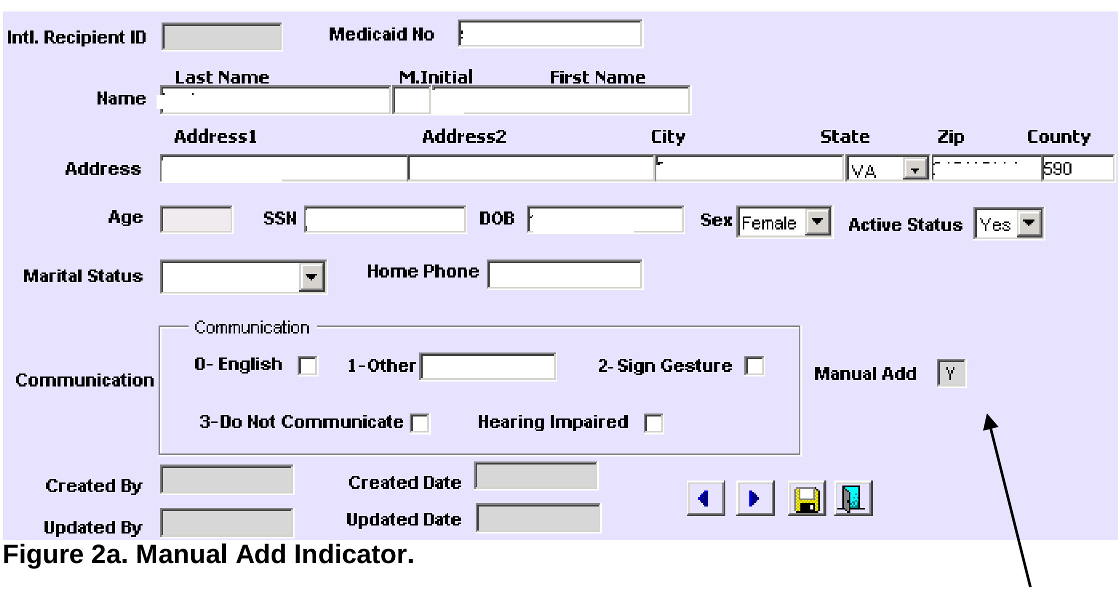


Figure 2a. Manual Add Indicator.

The Manual Add Indicator

Updating Recipients You Found in LOCER

You can only update Recipient information if you have already found the Recipient in the LOCER system. If you have not found the Recipient, return to the “Determining if the Recipient Already Exists” section above. If you have found the Recipient, proceed with the instructions below.

- On the Recipient Search Form, highlight the Recipient’s record by placing your cursor in any field of that Recipient’s record (shown in Figure 3 below. In this example we’re using Dorothy Barrett.)

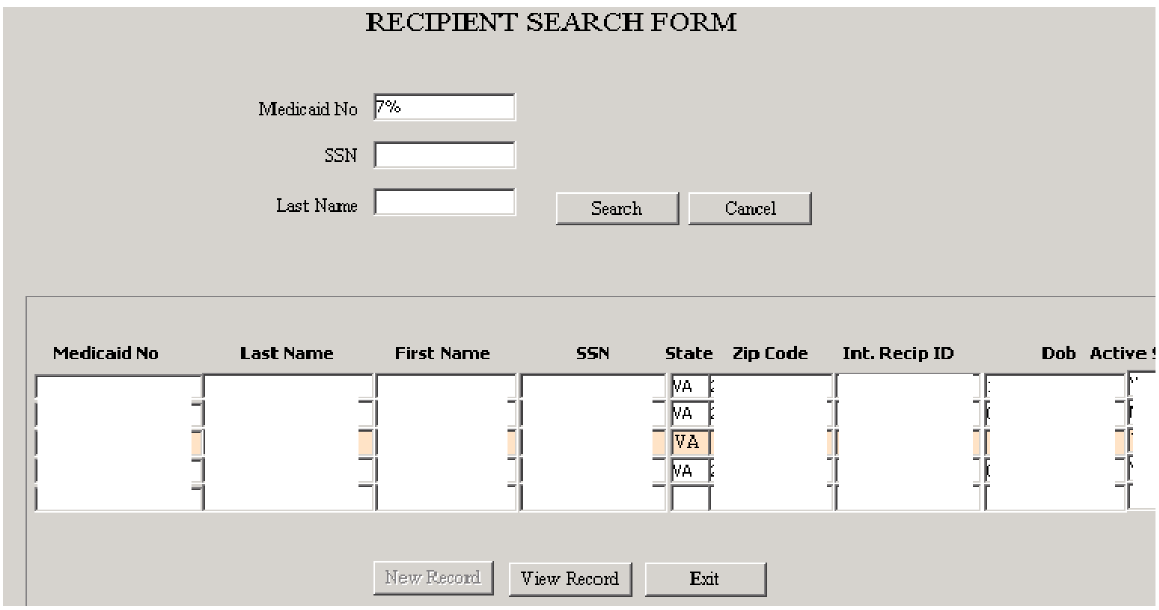


Figure 3. The Desired Recipient’s Record.

NOTE: For HIPAA compliance, personal information has been removed from the above.

- Click the View Record button at the bottom of the screen. Doing this will take you to a form tab called Recipient Info (shown in Figure 4 below).

Figure 4. Recipient Info Tab.

- On the Recipient Info tab, use the Recipient Identification / Background Information section of the "Level of Care Eligibility Review Instrument" form to add any missing information.
- Click the Save icon on the toolbar.
- Click the Review Info tab (circled in Figure 5 below) and see the "Working with Review Information" section below.

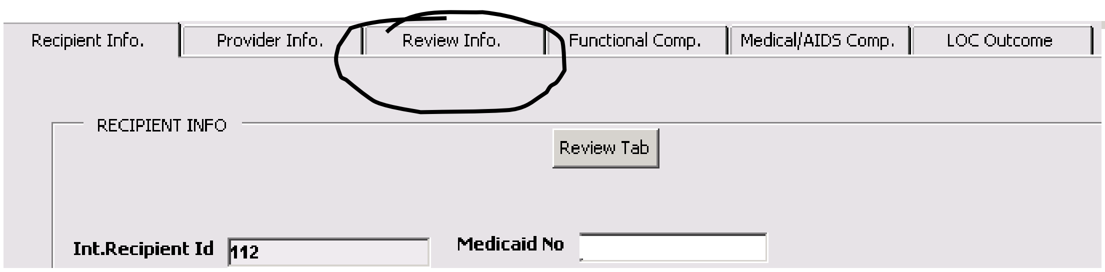


Figure 5. Review Info Tab.

Updating Recipients You (or Someone) Added Because they were Missing

You must use the "Add Missing Enrollee's Data" form to update a Recipient you added using the "Adding a Missing Recipient" section of this manual.

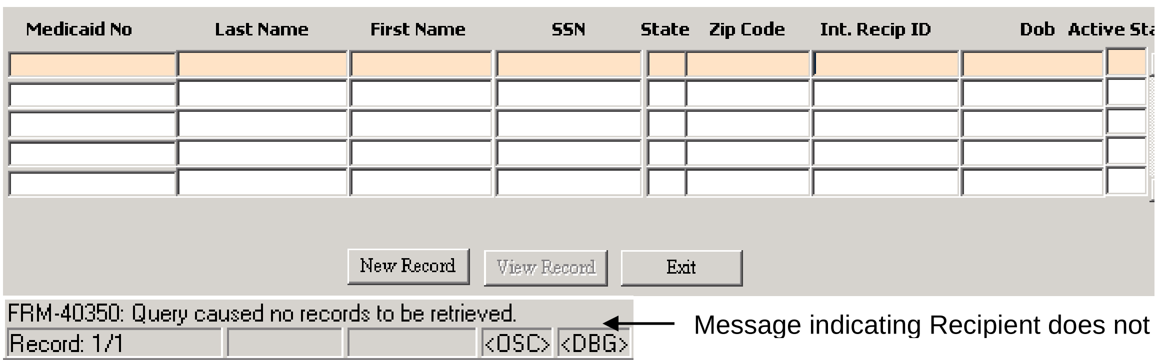
- Click the Forms menu
- Choose the "Adding Missing Enrollee's Data" form.
- Type the Medicaid Number in the "Medicaid No" field and press the Enter key.
- Make your changes.
- Click the Save icon.

Adding a New Recipient

You can add a new Recipient **only** if you have verified that the Recipient does **not** already exist in LOCER.

If you have not determined whether or not the Recipient already exists, return to the "Determining if a Recipient Already Exists" section above.

If the Recipient does not already exist in LOCER, then you will see blank rows on the lower portion of the Recipient Search Form (shown in Figure 6 below), and you will see a message in the lower-left corner saying the Recipient does not exist (also shown below).



Message indicating Recipient does not exist

Figure 6. Blank Rows Indicating Recipient Does Not Exist.

Do the following to add a new Recipient in LOCER:

- Click the New Record button on the Recipient Search Form (shown in Figure 6 above) to go to the Add/Edit Recipient Info screen (shown in Figure 7 below). (Alternatively, you can click the Forms menu and choose the "Enrollee Master Screen" option.)

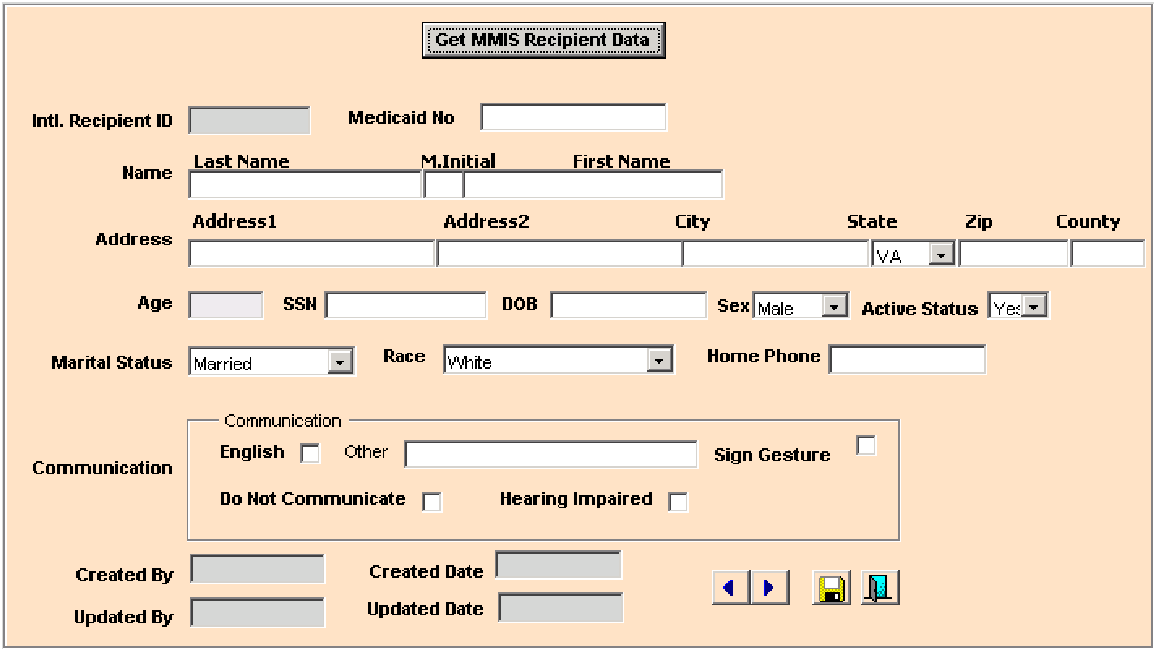
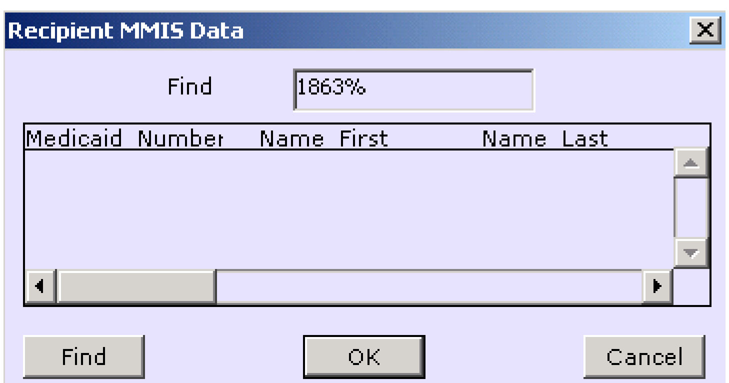


Figure 7. Add/Edit Recipient Info Screen.

- Click the Get MMIS Recipient Data button at the top of the screen shown above.
- Type the first two or three digits of the user's Medicaid Number in front of the "%" sign in the "Find" field (shown in Figure 8 below) and click the Find button. Doing this will find every Recipient with a Medicaid Number starting with the digits you entered.
- If the Recipient does <u>not</u> appear (see the empty box in Figure 7a below), then keep the empty box on your screen and proceed <u>right now</u> to the "Adding a Missing Recipient" section below. (If the Recipient does appear, continue on to the next bullet point in this section.)



If you see an empty box like this, proceed now to the "Adding a Missing Recipient" section below. (If the Recipient appears, proceed to the next bullet point in this section.)

Figure 7a. Recipient is Missing.

<u>NOTE:</u> See Appendix A, "Using the % Sign with Find Field Searches", for additional information on using the % sign with a search.

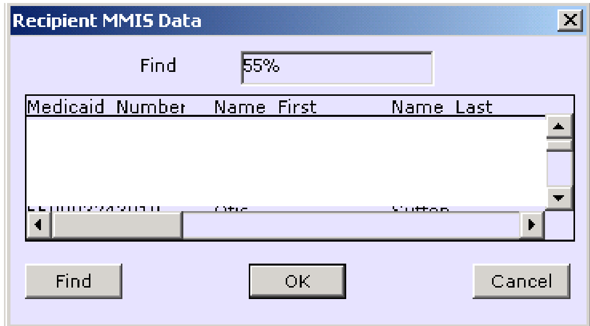


Figure 8. "Find" Field and Find button.

NOTE: Personal information has been removed from the above to comply with HIPAA regulations.

- Highlight the desired name by scrolling down to it, and click OK to select it. (Doing this will dismiss the "Recipient MMIS Data" box and populate the Add/Edit Recipient Info screen with the Recipient's information.)
- Using the Recipient Identification/Background Information portion of the "Level of Care Eligibility Review" form, fill in any information that is missing.
- Click the Save icon to save the information you added.
- Click the Exit icon and click YES when asked "DO YOU WANT TO EXIT THIS SCREEN?" (Doing this will return you to the Recipient Search Form.)
- On the Recipient Search Form, search for the person you just added. (If you are not sure how to search for the person you just added, refer to the "Searching by Medicaid Number", "Searching by SSN" or "Searching by Last Name" subsections above.)
- When you have found the person you added, highlight his or her record and click the View Record button (shown in Figure 9 below). Doing that will take you to the Recipient Info screen.

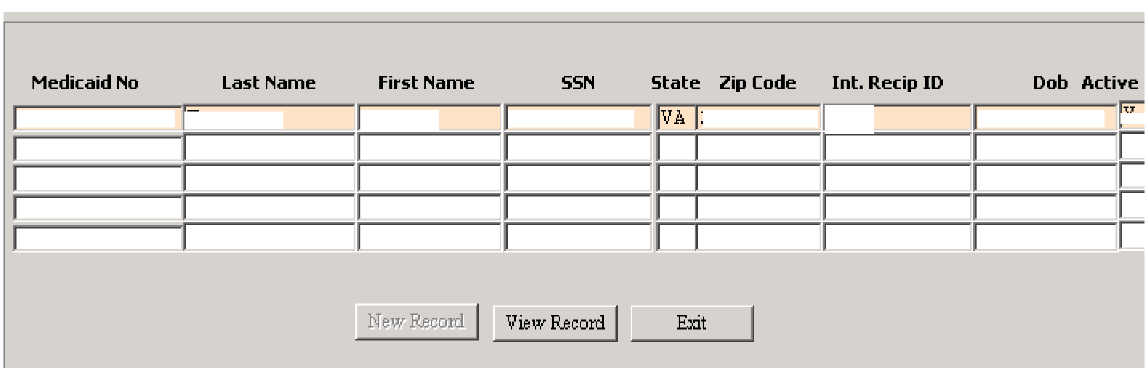


Figure 9. View Record Button.

- On the Recipient Info screen, click the Review Info tab (shown in Figure 5 above).
- See the "Working with Review Information" section (below) to begin working with the information on the "Level of Care Eligibility Review Instrument" form.

Adding a Missing Recipient

You should not attempt to add a missing Recipient until you have verified that the Recipient is actually missing. To verify that the Recipient is missing, assume first that the Recipient exists and begin with the section "Adding a New Recipient" above. If the Recipient does not exist, that section will refer you to this section at the appropriate point.

> *NOTE: Do not use this section if you have not tried the "Adding a New Recipient" section above first. That section will refer you to this section if you need to use this section; otherwise, don't use this section.*

If you are using this section, it should be because the empty box shown in Figure 7a above is on your screen. (These directions proceed from that point.)

- Click the Cancel button on the box shown in Figure 7a above. (If that box is not on your screen, then you should not be using this section. Refer instead to the "Adding a New Recipient" section above.)
- Click the Forms menu and choose the "Add Missing Enrollee's Data" option. You should see the pop-up box shown in Figure 9a below.

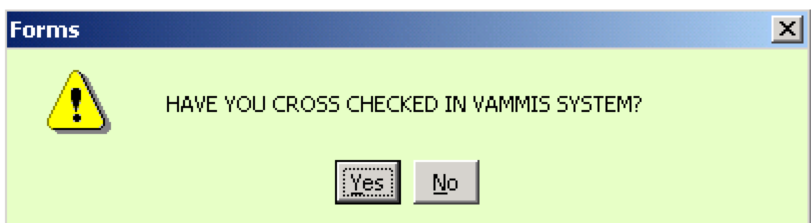


Figure 9a. Pop-up Box on "Add Missing Enrollee's Data" Screen.

- Click Yes if you have cross-checked in VAMMIS (you should have), or click No if you have not. Then proceed to the applicable bullet point below:

  If you clicked Yes:

  - You should see the screen shown in Figure 9b below (but without any data in the fields).

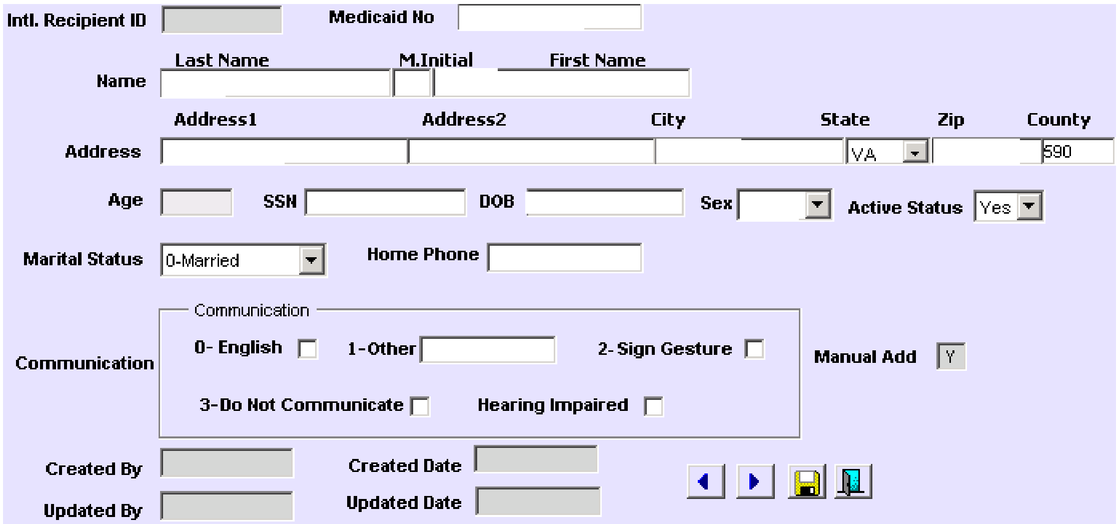


Figure 9b. Adding a Missing Recipient.

- Enter the Medicaid Number in the “Medicaid No” field and press Enter. Doing this will pull in the Recipient’s data.
- Click the Save icon.
- See the important note below about updating data for manually added Recipients.

✐ *<u>NOTE:</u> If you add a missing Recipient, you must use the “Add Missing Enrollee’s Data” form (shown in Figure 9b above and accessible under the Forms menu) to make any additions or changes to that Recipient’s data. If you try to use the “Enrollee Master Screen” you will NOT be able to find the Recipient.*

<u>If you clicked No:</u>

- Clicking No will take you to the screen shown in Figure 7 above. If you arrive at that screen, proceed now with the first bullet point below Figure 7.

Working with Review Information

Before you can enter the review information on the “Level of Care Eligibility Review Instrument” form, you have to either add the Recipient to LOCER or verify that he or she already exists in the system. If you have not added or verified the Recipient, see the “Determining if a Recipient Already Exists” section above before proceeding. If you have verified or added the Recipient, proceed with the instructions below.

- On the Review Info tab (shown in Figure 10 below), make a mental note of the number in the “Review Id” field. You will need to make sure that same Review Id number appears on the other screens as you process the current Recipient.
- On the Review Info tab, click the “Int. Provider Id” dropdown arrow (also shown in the figure below).

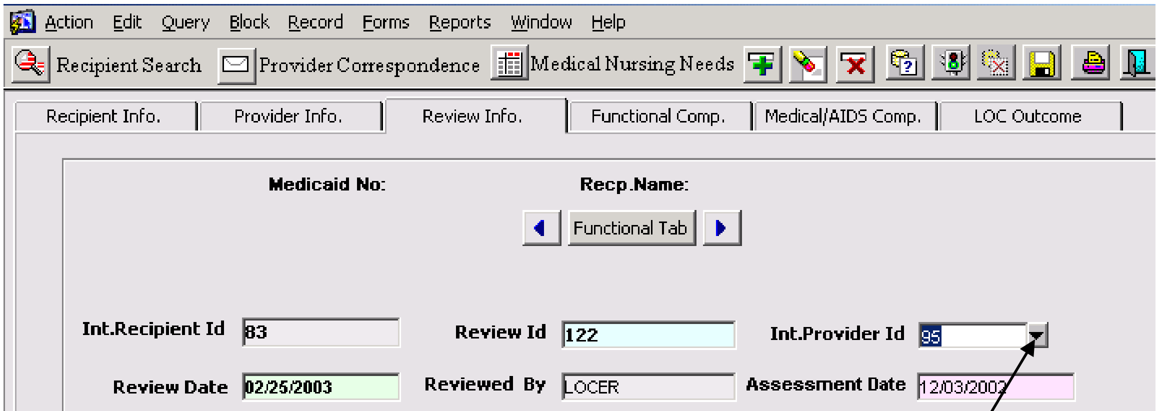
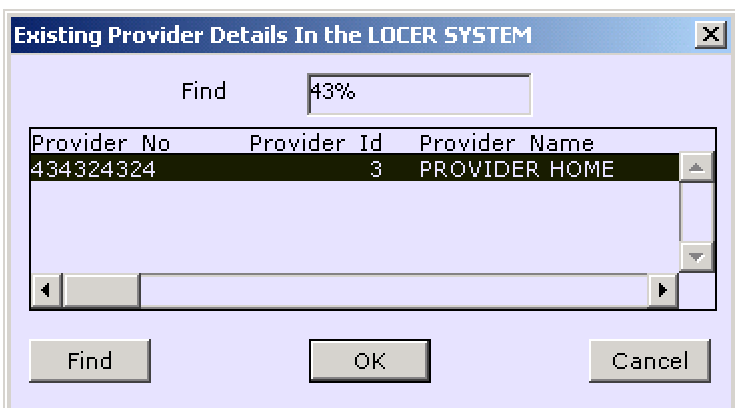


Figure 10. Review Info Tab.

"Int Provider Id" dropdown arrow

- In the "Find" field on the pop-up box that appears (shown in Figure 11 below), type the first two or three digits of the Provider number *in front of* the "%" sign and click the Find button to see if the Provider exists in LOCER.



If the Provider does not yet exist in LOCER, you will not see anything here.

Figure 11. Find Provider Box.

NOTE: See Appendix A, "Using the % Sign with Find Field Searches", for additional information on using the % sign with a search.

- Do one of the following depending on whether the Provider exists:

  - If the Provider **does not** exist in LOCER yet, click the Cancel button (shown in Figure 11 above) and see the "Adding a Provider" section below. *Resume with the next bullet point below when you have added the Provider*.

- If the Provider **does** exist, select it and click the OK button (shown in Figure 11 above) to choose it. Then proceed to the next bullet point below.

- Using the Assessment & Waiver Information section of the “Level of Care Eligibility Review Instrument” form, fill in the Waiver Type section of the Review Info tab (shown in Figure 12 below).

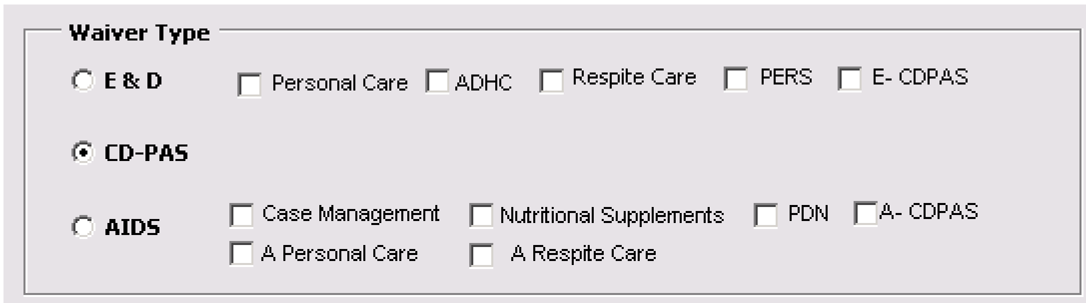


Figure 12. Waiver Type Section.

- Click the Scroll Down button at the right corner of the Review Info tab (shown in Figure 13 below) and fill in the remaining fields on the form.

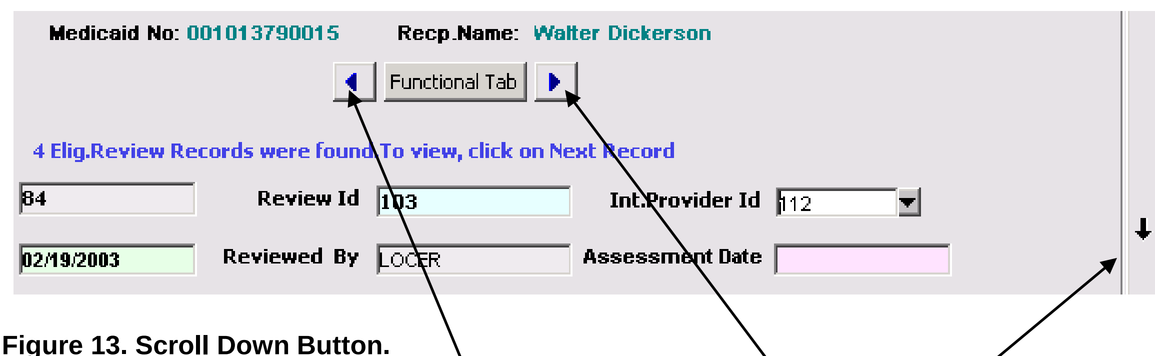


Figure 13. Scroll Down Button.

Previous Record icon

Next Record icon

Scroll Down

> ✐ *NOTE: You do not need to choose Yes or No for the “Active Status” radio button. That value will be automatically updated by LOCER depending on the Recipient’s eligibility.*

- Click the Scroll Up button at the corner right of the Review Info tab.
- Click the Functional Comp tab.
- Refer to the Recipient Eligibility Information – Functional Status portion of the “Level of Care Eligibility Review Instrument” form to fill in the fields on the Functional Comp tab.
- Click the Medical/AIDS Comp tab.

- Verify that the number in the "Review Id" field is the same as the one you made note of above. **If it is**, go to the next bullet point below. **If it is not**, do the following to get to the right record:

    - Click the Review Info tab.
    - Using the Next Record or Previous Record arrow buttons (labeled in Figure 13 above), scroll to the record that shows the same Review Id as the one you made a mental note of above.
    - Click again on the Medical/AIDS Comp tab.
    - Verify that the correct Review Id is showing there.
    - Proceed to the bullet point below.

> ✐ *NOTE: If a Recipient has more than one Review Id, it is because his or her eligibility has been evaluated more than once. Each LOCER eligibility review results in a new Recipient Review record.*

- If the waiver type is AIDS, type "Y" in the "Aids Diagnosis" field on the right side of the screen. (If the waiver is CD-PAS or E&D, do nothing in this step.)
- Refer to number 2, Current Medical Nursing Need(s), on page 2 of the "Level of Care Eligibility Review Instrument" form, and proceed according to which of the three situations described below applies to the form:

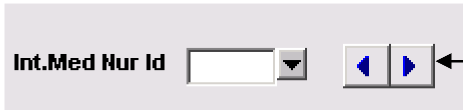
    - ❑ NO "OTHER" – If the "Other" checkbox (the last one in the list) has **not** been filled in, proceed now to the "Choosing Medical Nursing Needs" section below.

    - ❑ ONLY "OTHER" – If the "Other" checkbox is the **only** one that has been filled in (along with a corresponding written description), proceed now to the "Adding a New Medical Nursing Need" section below.

    - ❑ "OTHER" AND ONE OR MORE CHECKBOXES – If the "Other" checkbox has been filled in (along with a corresponding written description) **and** other checkboxes in the list have been checked proceed now to the "Choosing Medical Nursing Needs" section below.

Choosing Medical Nursing Needs

Choosing Medical Nursing Needs means choosing items from the "Int Med Nur Id" dropdown list that correspond to the items checked in the Current Medical Nursing Needs section (page 2) of the "Level of Care Eligibility Review Instrument" form. (The "Int Med Nur Id" field is shown in Figure 14 below.)

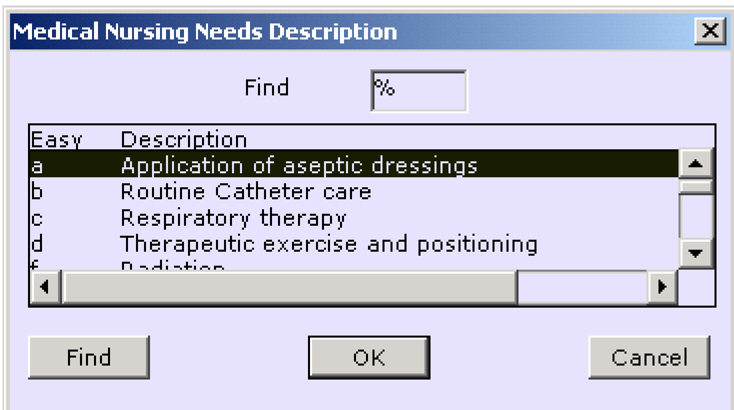


"Next Record" icon

Figure 14. "Int. Med Nur Id" field.

Do the following to choose Medical Nursing Needs:

- Click the "Int Med Nur Id" field's dropdown arrow. Doing this will launch the pop-up box shown in Figure 15 below.



Click on desired item in the list; then click OK to select it.

To find items without scrolling to them, refer to Appendix A, "Using the % Sign with Find field Searches"

Figure 15. Medical Nursing Needs Pop-up Box.

- Click on the desired item in the pop-up list that appears.
- Click OK to select that item. (Doing this will dismiss the pop-up box.)
- Do one of the following, depending on whether or not more than one Medical Nursing Need checkbox was checked on the form:

  - ❑ <u>ONLY ONE CHECKED BOX</u> – If only one Medical Nursing Need checkbox was checked on the form, click the Save icon now and do one of the following:

    - ➢ If the "Other" checkbox was **<u>not</u>** filled in, proceed now to the "Calculating Eligibility" section below.
    - ➢ If the "Other" checkbox was filled in (along with a corresponding description), proceed now to the "Adding a New Medical Nursing Need" section below.

  - ❑ <u>TWO OR MORE CHECKED BOXES</u> – If two or more Medical Nursing Need checkboxes were checked, do the following now:

    - ➢ Click the Next Record icon (labeled in Figure 14 above). (Doing this will clear out the "Int Med Nur Id" field, but it will not delete the last selection you made.)

- Choose the list item that corresponds to the next checked checkbox on the form.
- Repeat the previous two steps (i.e., clicking Next Record and choosing an item from the list) until you have chosen all of the items checked in the Current Medical Needs section of the form.
- Click the Save icon when you have selected all items.
- Do one of the following now, depending on whether or not the "Other" checkbox was checked:
  - If the "Other" checkbox was filled in, proceed now to the "Adding a New Medical Nursing Need" section below.
  - If the "Other" checkbox was not filled in, proceed now to the "Calculating Eligibility" section below.

> ✐ *<u>NOTE</u>: If you selected multiple Medical Nursing Needs, a message similar to the one in Figure 16 will appear in the lower-left corner of the screen when you click the Save icon.*

Figure 16. Message.

This message indicates that two Medical Nursing Needs were chosen.

Adding a New Medical Nursing Need

You must add a new Medical Nursing Need when the "Other" checkbox (see Figure 17 below) in the Current Medical Nursing Needs section (page 2) of the "Level of Care Eligibility Review Instrument" form has been checked and a corresponding description has been written in the lines provided there.

> ☑ Other: (r) <u>Description of new Medical Nursing Need……………………….</u>
>
> ____
>
> ____

Figure 17. The "Other" Checkbox.

Do the following to add a new Medical Nursing Need:

- Click the Medical Nursing Need icon (shown in Figure 18 below). Alternatively, you may click the Forms menu and choose the "Add Medical Nursing Needs" option.

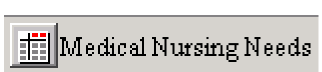


Figure 18. Medical Nursing Needs Icon.

- On the Medical Nursing Needs form (shown in Figure 18 below), click the Open Editor icon (labeled in Figure 19 below) to launch the Editor box.

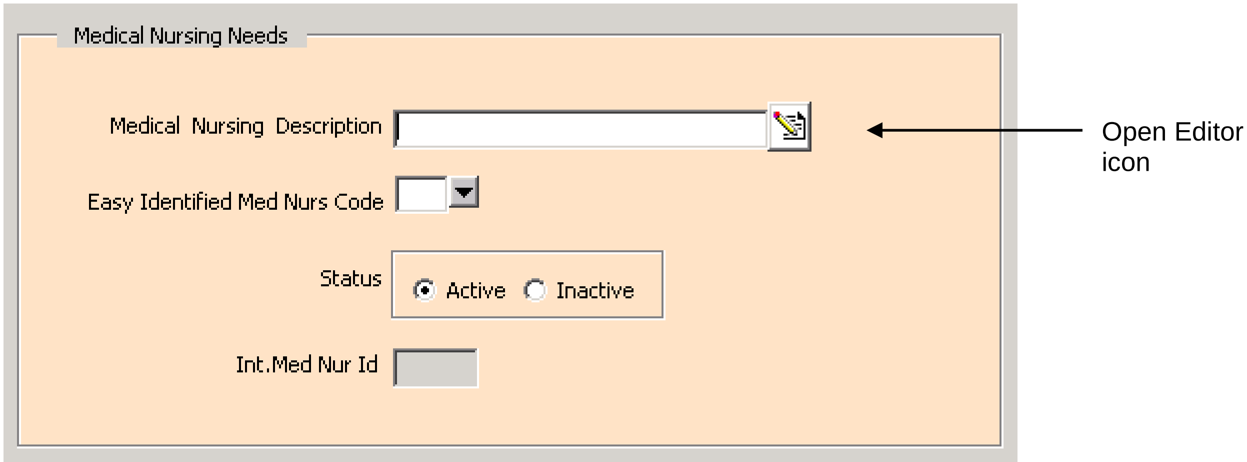


Figure 19. Medical Nursing Needs Form.

- In the Editor box (shown in Figure 20 below), type the description of the new Medical Nursing Need.

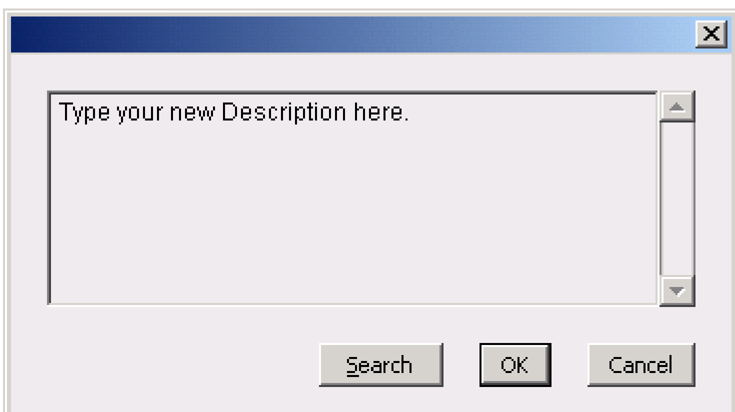


Figure 20. Editor Box.

- Click the OK button (shown above) to dismiss the Editor box.
- Type a corresponding code in the “Easy Identified Med Nurs Code” field. (It must be one that is not currently being used. You may click that field’s dropdown box to see a list of the codes currently being used.)
- Click the Save icon on the toolbar.
- Click the Exit icon to leave the Medical Nursing Needs screen.
- Click Yes when asked “DO YOU WANT TO EXIT THIS SCREEN?” (Doing this will return you to the screen you were on previously.)
- Proceed to the “Calculating Eligibility” section below to continue processing the form, or exit out if you are not currently processing a “Level of Care Eligibility Review Instrument” form.

Deleting Medical Nursing Needs

In order to delete a medical nursing need from the database, you must first delete the medical nursing need from any recipient records that have that medical nursing need.

Only a manager has the capability to delete a medical nursing need.

Part I: Deleting from Recipient Records

Do the following to delete a medical nursing need from recipient records:

- Click the Medical Nursing Needs icon at the top of the screen.
- Press the F8 key on your keyboard to query up the existing Medical Nursing Needs. (You’ll only see the first one in the “list”; in the next step you’ll scroll through them to find the one you want to delete.)
- Click the down arrow on your keyboard to scroll to the medical nursing need you want to delete.
- When you see the medical nursing need you want to delete, make note of its “Easy Identified Med Nurs Code”, shown in Figure 20a below.

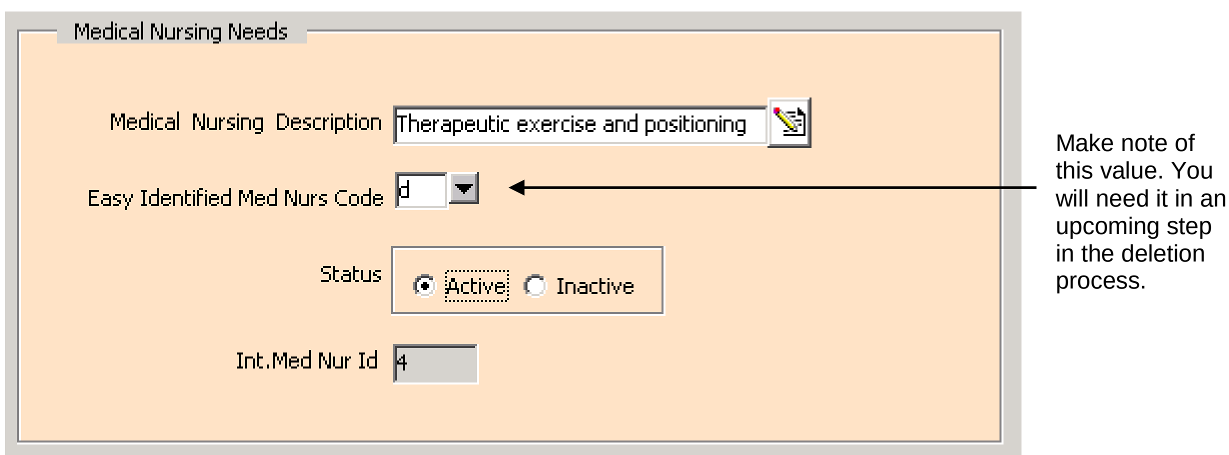
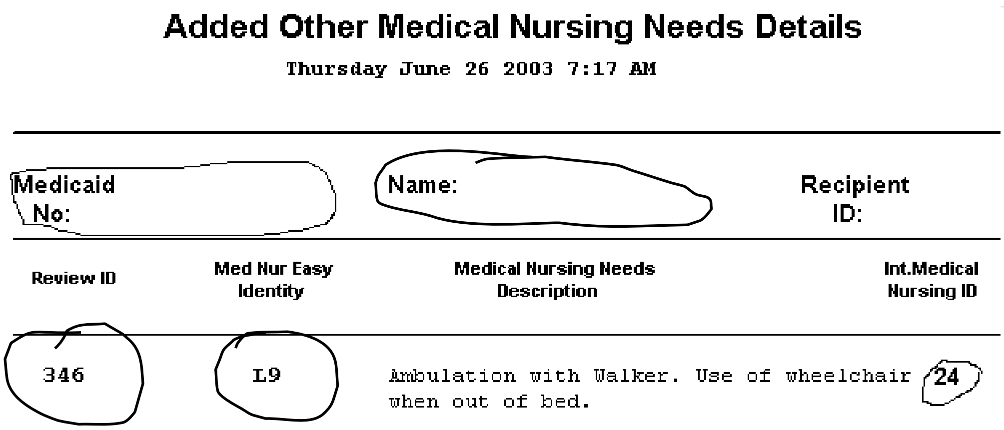


Figure 20a. Easy Identified Med Nurs Code.

- Click the Reports menu and choose the “Added Medical Nursing Report”.
- In the report that appears on your screen (shown in Figure 20b below), find the Easy Identified Med Nurs Need you noted earlier. It will be in the “Med Nur Easy Identity” column of the report.



Added Other Medical Nursing Needs Details

Thursday June 26 2003 7:17 AM

Medicaid No:	Name:		Recipient ID:
Review ID	**Med Nur Easy Identity**	**Medical Nursing Needs Description**	**Int.Medical Nursing ID**
346	19	Ambulation with Walker. Use of wheelchair when out of bed.	24

Figure 20b. Portion of "Added Med Nurs Report".

- When you have found the Easy Identified Med Nurs Need in the report (circled above), make note of the corresponding recipient's name (also circled above).
- Next, make note of the Review ID (also circled above). You will need this to delete the medical nursing need from that recipient's information.
- Close the report by clicking the 'X' in the upper-right corner.
- Click the Recipient Search icon at the top of the screen.
- Query for the recipient using the last name.
- Highlight that recipient's record by clicking in it (shown partially in Figure 20c below).

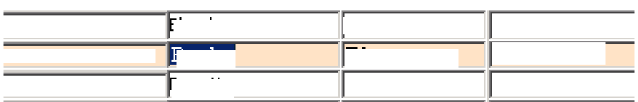


Figure 20c. Highlighted Recipient Record on Recipient Search Screen.
NOTE: The highlighted one has the orange background, but PHI data has been removed.

- With the recipient record highlighted, click the View Record button at the bottom of the screen.
- Click Review Tab button.
- Using the arrows shown in Figure 20d below, scroll to the Review ID you noted above. You will see the ID appear in the "Review ID" field.

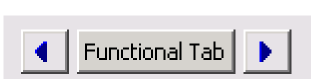
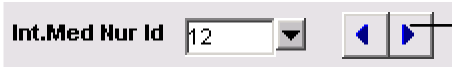


Figure 20d. Scroll Arrows.

- When you see the correct Review ID in the "Review ID" field, click the Medical/AIDS Comp tab.

- Using the arrow buttons shown in Figure 20e below, scroll to the Med Nur Id you noted above.



Next Medic. Nurs. Needs Record

Figure 20e. Arrow Buttons.

- Click the Delete Other Medical Record button to delete the medical nursing need.
- Re-query the record by clicking the Run Query icon on the toolbar. (Doing this will show you that the medical nursing need was deleted.)
- Now you are ready to delete the medical nursing need from the database. See "Part II: Deleting from the Database" below.

Part II: Deleting from the Database

You cannot delete a Medical Nursing Need from the database until you have deleted it from recipient records. If you have not yet done that, see "Part I: Deleting from Recipient Records" above.

Do the following to delete a Medical Nursing Need from the database:

- Click the Medical Nursing Needs icon at the top of the screen.
- Press the F8 key on your keyboard to query up the existing Medical Nursing Needs. (You'll only see the first one in the "list"; in the next step you'll scroll through them to find the one you want to delete.)
- Click the down arrow on your keyboard to scroll to the Medical Nursing Need you want to delete.
- Click the Remove Record icon on the toolbar.
- Click the Save icon on the toolbar to save the deletion.

Calculating Eligibility

You must calculate the Recipient's eligibility when you have finished adding/updating Recipient and Review information provided on the "Level of Care Eligibility Review Instrument" form. You will calculate eligibility from the Medical/AIDS Comp tab (labeled in Figure 21 below).

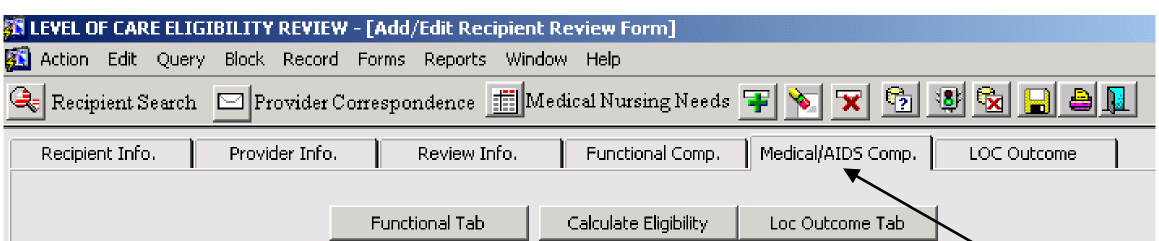


Figure 21. Medical/AIDS Comp Tab.

Medical/AIDS Comp tab

Do the following to calculate eligibility:

- Click the Save icon to double-check that you have saved your additions and changes.
- Click the Calculate Eligibility button (shown in Figure 21 above) to tell LOCER to make the determination.
- Click OK on the pop-up box (shown in Figure 22 below) that tells you whether or not applicable criteria have been met.

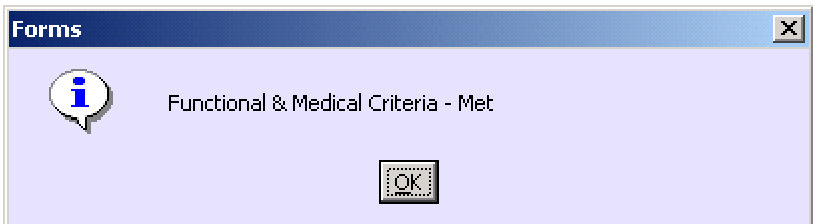


Figure 22. Informational Message.

- Click the Save icon on the toolbar to save the eligibility calculation. (DO NOT SKIP THIS STEP.) See the informational note below.

NOTE: You must press the Calculate Eligibility button on the Medical/AIDS Comp. Tab any time you make a change on that tab or the Functional Comp. Tab.

- Click the LOC Outcome Tab button (shown in Figure 21 above) to go to the LOC Outcome tab of the screen.
- If the eligibility status is yes proceed to the “Processing if Eligibility is YES” section below; if the eligibility status is no, proceed to the “Processing if Eligibility is NO” section (also below).

Processing if Eligibility is YES

You must be on the LOC Outcome tab to process a YES eligibility.

- Click the ADD HRS SCREEN button on the LOC Outcome tab to launch the box shown in Figure 23 below.

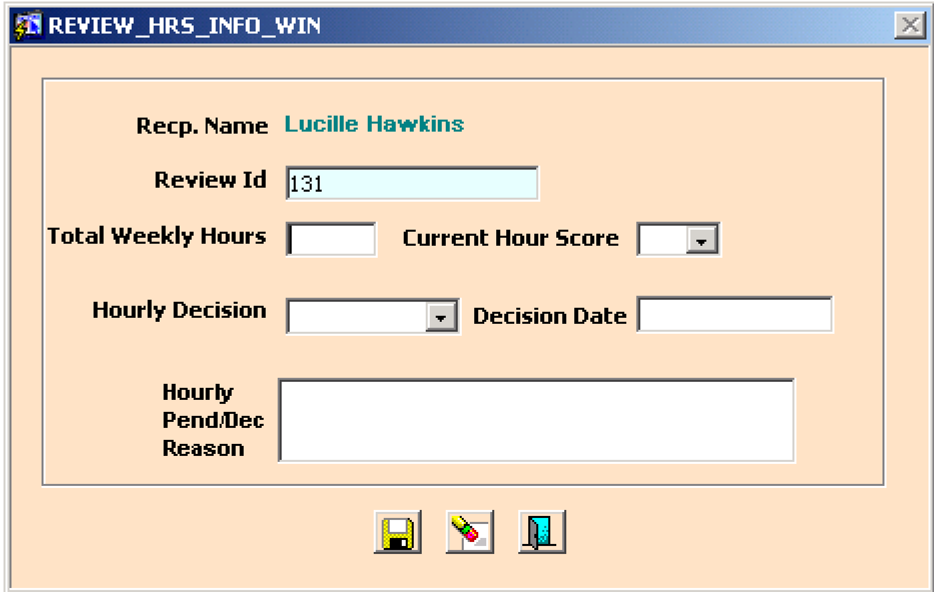


Figure 23. ADD HRS Box.

- Fill in the fields on the ADD HRS box and click the Save icon on the box.
- Look in the lower-left corner of the screen to verify that the transaction was saved, and then proceed as follows according to whether or not your ADD HRS information was saved successfully:

  - <u>SAVED SUCCESSFULLY</u> – If you see a message confirming your Save (as shown in Figure 24 below), click the Exit icon on the ADD HRS box to dismiss it. (You are now finished with LOCER processing for the Recipient.)

Figure 24. Confirmation of Save.

  - <u>NOT SAVED</u> – If you see an error message like the one in Figure 25 below, proceed to the “Choosing the Right Record” section below.

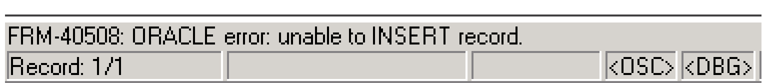


Figure 25. Error on Save.

Processing if Eligibility is NO

You must be on the LOC Outcome tab to process a NO eligibility.

- If the Eligibility Status on the LOC Outcome tab is NO, then click the Send/View Letter button (also on the LOC Outcome tab). Doing this will take you to the screen shown in Figure 26 below.

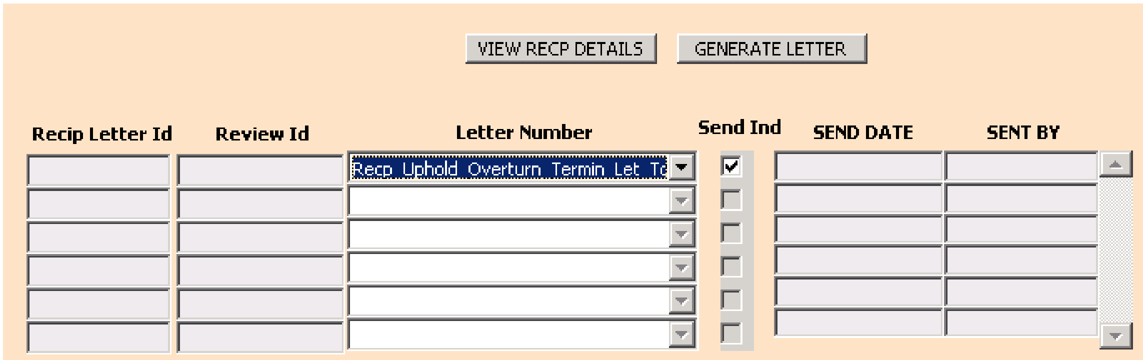


Figure 26. Letter Screen.

- On the Letter screen, click the dropdown arrow for the “Letter Number” field (shown above), and select the desired letter by clicking on it.
- User can send one of the three letters, based on the requirement. Letters are: Recipient discharge letter to recipient, recipient discharge letter to provider and review hours overuse letter to provider.
- Click the Save icon.

Choosing the Right Record

If you received the error message shown in Figure 24 above when you tried to save the ADD HRS information, then you are probably on the wrong record for the given Recipient. Do the following to correct this situation:

- Exit out of the ADD HRS box by clicking the Exit icon on the box (shown in Figure 23 above).
- Click the Review Info tab.
- Click the Query Mode icon (see the “Toolbar Icons” section of this manual if you are not sure which icon this is).
- Click the Execute Query icon (see the “Toolbar Icons” section of this manual if you are not sure which icon this is). Doing this will return all records for the Recipient Id you are working with.
- Click the down arrow on your keyboard to scroll to the right record for the given Recipient. You should be able to determine the right record by looking at the “Review Date” field (on the Review Info tab).
- When you have the correct record on the Review Info tab, click the LOC Outcome tab on your screen.
- Click the ADD HRS SCREEN button again.
- Fill in the fields on the ADD HRS box and click the Save icon on the box.
- Click the Exit icon on the box to dismiss it.

Overriding Eligibility

Sometimes it may be necessary to override an eligibility determination. Do the following to make an override:

- On the LOC Outcome tab, click the OVERRIDE button.
- Fill in the “Override Ind” and “Override Rsn” fields on the Override Eligibility Status box (shown in Figure 27 below).

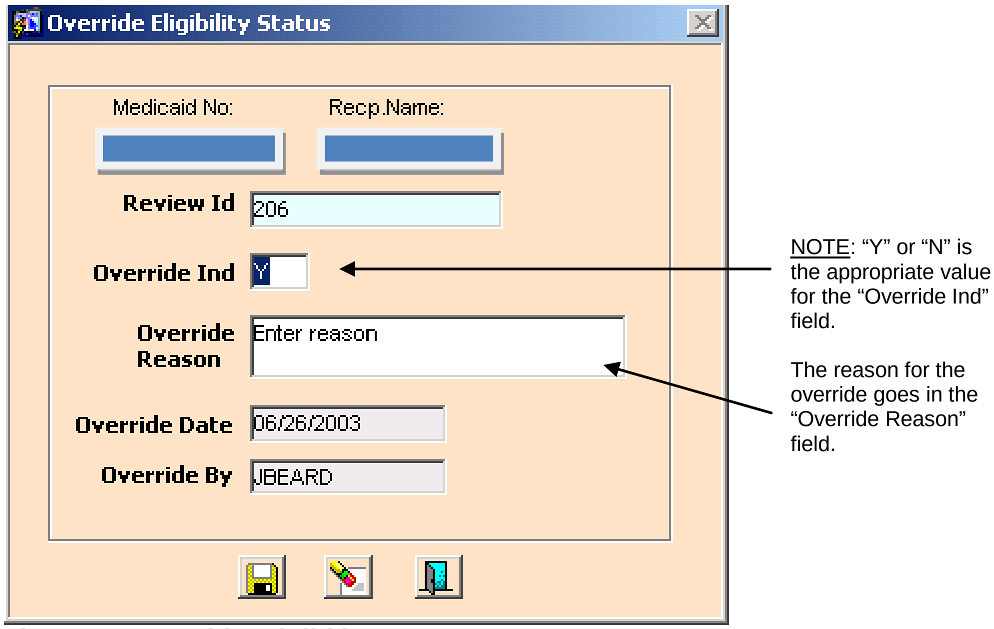


Figure 27. Override Eligibility Status Box.

- Click the Save icon on the box shown above.
- Click the Exit icon on the box shown above to dismiss the box. (Note that the “Review Id”, “Override Date”, and “Override By” fields will be filled in automatically.)
- Re-query the record by clicking the Run Query icon on the toolbar. (Doing this will take you to the Review Info tab.)
- Navigate to the particular Review Record if there are more than 1 review for the same enrollee.
- Click the LOC Outcome tab to see the change in status. See the example in Figure 28 below:

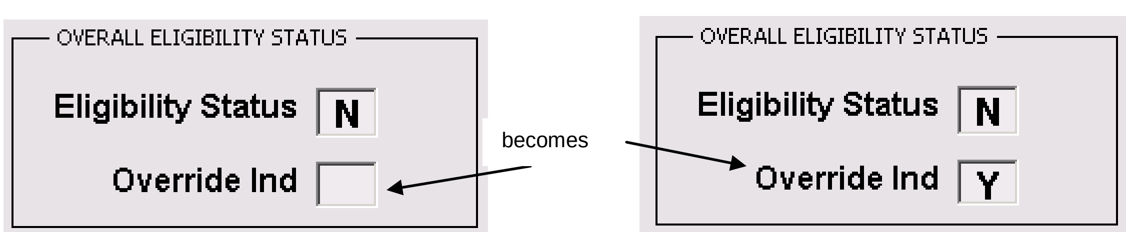


Figure 28. Sample Change in Eligibility Status.

- Once the manager overrides the eligibility condition, click on Change Active Status Button .  in the LOC outcome tab.

NOTE: You will notice Change Status button only for the latest REVIEW RECORD and when Override Indicator is Y for that latest review record.

Adding a Provider

If the Provider associated with the Recipient does not yet exist in LOCER, you will have to add that Provider. Do the following to add a Provider to LOCER:

- Click the Forms menu option.
- Choose the “Provider Master Screen” option.
- Type the Provider Number in the “Provider No” field on the Provider Details screen (shown partially in Figure 29 below).

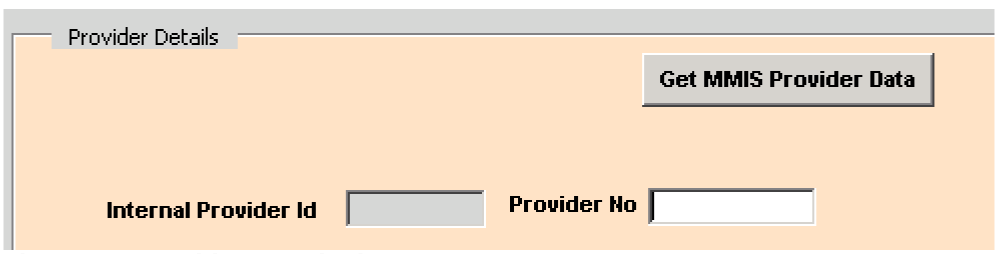


Figure 29. Provider No. Field

- Press Enter. (Doing this will retrieve the Provider’s information from the MMIS.)
- Click the Save icon to save the Provider’s information to LOCER.
- Do one of the following depending on what screen you were on prior to accessing the Provider Master form:

    - ❑ If you were on the Review Info tab: Click the Exit icon to return to the Review Info tab, and see the bullet point directly above Figure 12 above.

    - ❑ If you were not on the Review Info tab, click the Exit icon to return to whatever screen you were on.

Tracking Provider Letters

Do the following to indicate that you have sent a thank-you letter to a Provider:

- Click the Provider Letter icon (shown in Figure 30 below) located at the top of the screen.

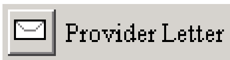


Figure 30. Provider Letter Icon.

- *In front of* the "%" sign in the "Provider No" field (shown in Figure 31 below), type the first couple of digits of the Provider's Provider Number. (See Appendix A for additional information on using the "%" sign to perform queries.)

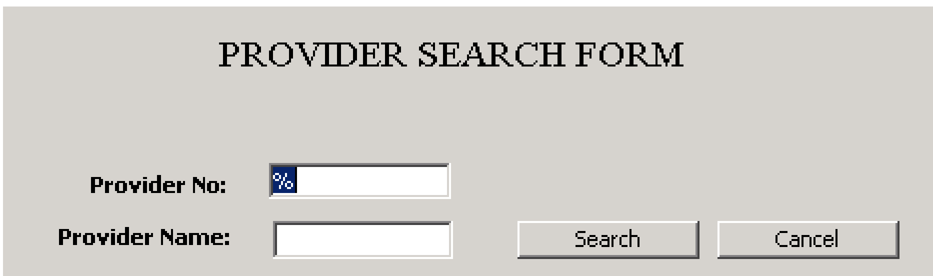


Figure 31. "Provider No." Field on Provider Search Form.

- Click the Search button (shown in Figure 31 above) to execute the query.
- Click once on the desired Provider to highlight it (as shown in Figure 32 below).

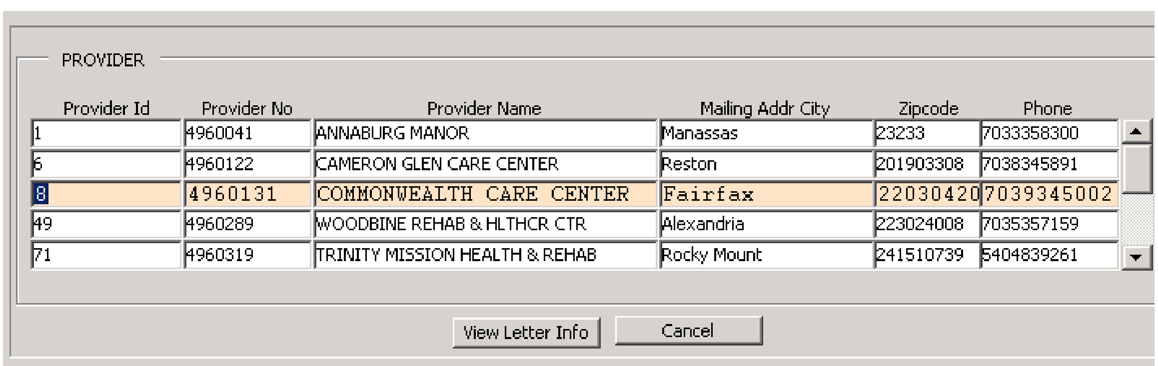


Figure 32. Highlighted Provider Name.

- Click the View Letter Info button (also shown in Figure 32) to launch the screen shown in Figure 33 below.

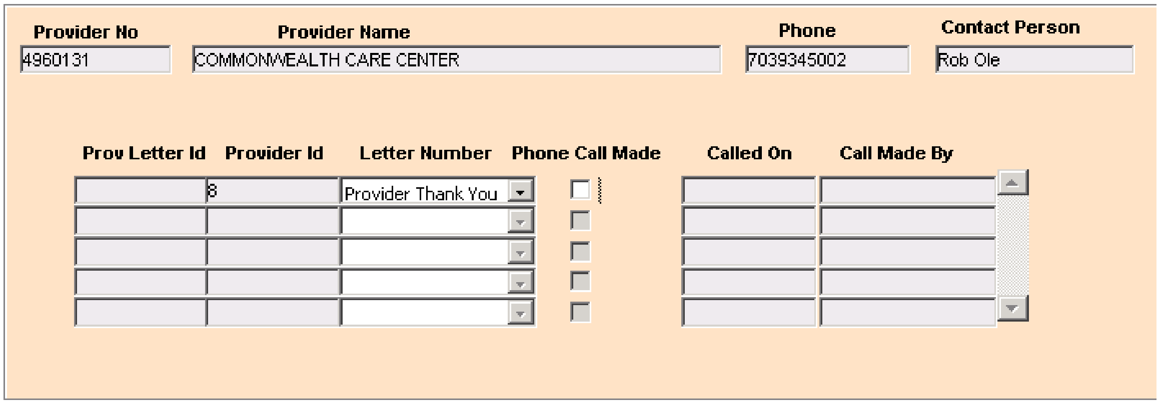


Figure 33. Provider Letter-tracking Screen.

- Click the dropdown arrow for the "Letter Number" field and choose the Provider Thank You letter.
- Click the corresponding "Phone Call Made" checkbox to indicate that the call was made.
- Click the Save icon on the toolbar.
- Click the Exit icon on the toolbar to return to the screen you were previously on.

Reports

The Reports menu in LOCER provides access to the reports described in this section.

Execute reports one of the following ways:

- Click the green stoplight icon on the report parameter form

-OR-

- Click the Show Report button on the report parameter form.

Added Medical Nursing Report

This report shows the following information for recipients who have "OTHER" Medical Nursing Needs assigned to them:

Medicaid Number
Recipient Name
Recipient ID
Review ID
Med Nur Easy Identifier
Med Nur Need Description
Internal Med Nur ID

Age Related

Fill in the information indicated by the field labels and click the Show Report button.

Waiver Related

Fill in the information indicated by the field labels and click the Show Report button.

Provider-Enrollee List

Fill in the information indicated by the field labels and click the Show Report button.

Total Reviews Reviewed Per Day

Fill in the “from” and “to” dates and click the green stoplight icon to execute the report.

Provider-Enrollee Hourly Report

If you need to run the Hourly report only for single provider, enter the “from” and “to” dates and fill in the hours and select provider from the LOV list in the “Select Specific Provider” frame. Click the show button to view the report.

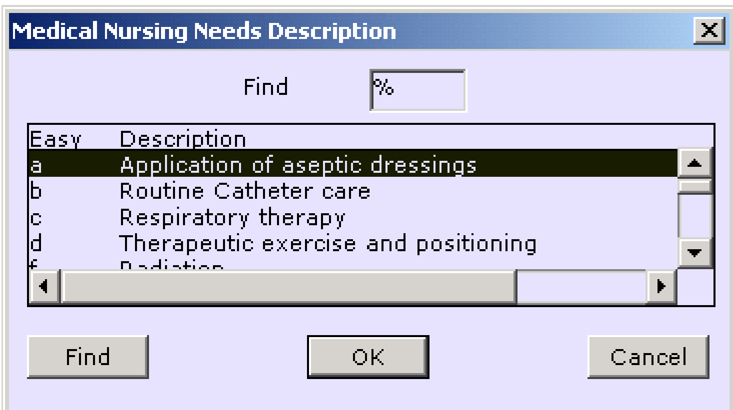
If you want to run the report for all the providers fill the hours text box as seen in “select All Providers” section and click ALL PROVIDERS button.

In either situation, “from” and “to” dates are entered.

Appendix A: Using the % Sign with "Find" Field Searches

"Find" fields appear in connection with several dropdown lists in the LOCER system. The purpose of the dropdown lists is to provide you with a list of applicable values for the field you are filling in. The purpose of the "Find" field is to let you find the selection you want without scrolling through the entire list of applicable values.

Figure A1 shows a sample "Find" field.



"Find" fields allow you to find a specific value in the list without having to scroll through the list to find it.

Figure A1. Sample "Find" Field.

What the "%" Sign Does

The "%" sign stands in place of <u>*one or more*</u> alphanumeric characters so that you can conveniently type a portion of the value you are looking for instead typing the whole thing. This is useful if you are searching by Medicaid Number, since it is easier to type the first two or three digits than to type the whole number.

The "%" sign automatically appears in every "Find" field.

What You Should Do with the % Sign

You should always leave the "%" sign in the "Find" field when you use the "Find" field to help you find a selection in the corresponding list. You should type search criteria <u>*before it or after it, depending on the numbers or letters you do not know or are leaving out.*</u> Most of the time you will type <u>*in front of*</u> the "%" sign.

Figure A2 below shows what partial piece of information you should supply based on what tab/field you are in.

Tab or Screen	Field	What You Should Enter in the "Find" Field
Recipient Search Form	Medicaid No	A few digits of the Medicaid Number. See the example in Figures A3 and A4 below.
Review Info tab	Int. Provider Id	A few digits of the Provider Number
Medical Nursing Needs	Easy Identified Med Nurse Code	The single-character code, such as "d" or "r". (In cases where the code is only one letter or number, you technically don't need the "%" sign. This is because the job of the "%" sign is to replace one or more numbers or letters, and you are not replacing any numbers or letters when you are supplying one number or letter for something that is only one number or letter anyway.)
Medical/AIDS Comp	Int. Med Nur Id	The single-character code, such as "f" or "p".

Figure A2. Table of "Find" Fields.

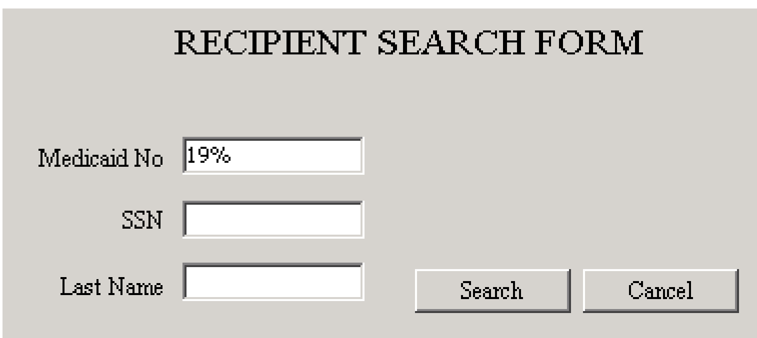


Figure A3. Sample Search.

If you typed "%18" in the "Medicaid No" field, you would still get the same Recipient since his Medicaid Number *ends* in "18", and since the "%" sign is in front of the "18".

Remember: The "%" sign replaces one or more characters, so it should be placed *before or after* the text you supply, depending on the relative position of the text you are NOT supplying.

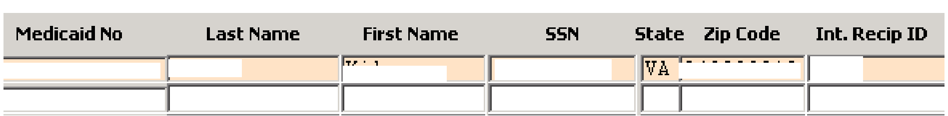


Figure A4. Results of Sample Search (minus all PHI).