User Guide Addendum

Information included in the Long Term Care (LTC) Online Portal User Guide for Managed Care Organizations (MCOs) has been updated to reflect changes to the Power Search results list.

Currently, the Long Term Care Online Portal does not display the Local Intellectual & Developmental Disability Authority/Local Mental Health Authority (LIDDA/LMHA) Vendor or Contract Numbers in the Power search results for the PASRR Level 1 Screening (PL1).

Additionally, LIDDA/LMHA signature dates from the PL1 Interdisciplinary Team (IDT) meeting are not displayed in the power search results or the export to excel functionality. Consequently, internal users have to manually search for the IDT information for reporting purposes.

An enhancement to the LTC Online Portal will now display LIDDA/LMHA Vendor and Contract Numbers and LIDDA/LMHA Signature Dates in the Power search results and also when exported to Microsoft Excel™ when searching for PL1 form type across form type searches.

This will allow Power Search users to utilize IDT and PL1 data for reporting and quality monitoring.

The details of this update are outlined in the addendum, which immediately follows the User Guide and can be accessed by using the bookmarks.

Click the link to view the following addendum: Power Search Results Addendum

Addendum added June 24, 2016.

For more information, contact the LTC Help Desk at 1-800-626-4117, Option 1.

Information included in the Long Term Care (LTC) Online Portal User Guide for Managed Care Organizations (MCOs) has been updated to reflect changes to Power Search. A new field labelled “Associated Vendor Number” will be displayed in the Additional Criteria section of Power Search.

The details of this update are outlined in the addendum, which immediately follows the User Guide and can be accessed by using the bookmarks.

Click the link to view the following addendum: Associated Vendor Number Addendum

Addendum added June 24, 2016.

For more information, contact the LTC Help Desk at 1-800-626-4117, Option 1.
Long Term Care Online Portal User Guide for Managed Care Organizations
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Long Term Care (LTC) Online Portal Basics

What is the LTC Online Portal?

The LTC Online Portal is a web-based application that allows users to:
- View forms and assessments.
- Create Saved Searches.
- Conduct a form status inquiry.
- Retrieve reports.
- Add a note to a form or assessment.

Benefits of the LTC Online Portal

- Web-based application
- 24/7 availability
- Texas Medicaid & Healthcare Partnership (TMHP) provides LTC Online Portal technical support by telephone at 1-800-626-4117, Option 3, from 7:00 a.m. – 7:00 p.m., Central Time, Monday through Friday – excluding holidays.

General Security Information

Security clearance and access to needed LTC Online Portal features are based on the role of the user, allowing them to complete the tasks associated with their job requirements. The options available on the blue navigational bar are based on the security profile assigned to each user; therefore, some options on the blue navigational bar may not be available for all users.

Blue Navigational Bar Links

All LTC Online Portal features that are available for your security level are located on the blue navigational bar at the top of the screen.

Depending on your security permissions, options may include: Home, Submit Form, Form Status Inquiry, Current Activity, Drafts, Power Search, My Searches, Letters, Printable Forms, or Help.
Home

When the blue navigational bar is displayed, the Home link at the far left will take you to www.tmhp.com.

Submit Form

The Submit Form feature allows providers to submit Waiver 3.0: Medical Necessity and Level of Care Assessments and H1700-1: HCBS STAR+PLUS Waiver Individual Service Plan forms.
**Note:** The steps to submit H1700-1: HCBS STAR+PLUS Waiver Individual Service Plans are covered in the "H1700 / Individual Service Plan (ISP) Form" section.
Form Status Inquiry (FSI)

The FSI feature provides a query tool for monitoring the status of forms and assessments that have been successfully submitted.

Providers may use FSI to search for either Type of Form: Waiver 2.0: Medical Necessity and Level of Care Assessments, Type of Form: Waiver 3.0: Medical Necessity and Level of Care Assessments, or H1700-1: HCBS STAR+PLUS Waiver Individual Service Plan. The search does not have the capability to return both 2.0 and 3.0 Assessments with one search. Searches must be performed separately for 2.0 and 3.0 Assessments.

FSI allows providers to retrieve assessments in order to:

- Access assessments to research and review statuses.
- Provide additional information to an assessment.
- Retrieve assessments to make corrections or perform inactivations.
- Resolve any assessments set to status Provider Action Required.

1) Click the Form Status Inquiry link in the blue navigational bar.

2) Type of Form: Choose Waiver 2.0: Medical Necessity and Level of Care Assessment or Waiver 3.0: Medical Necessity and Level of Care Assessment or H1700-1: HCBS STAR+PLUS Waiver Individual Service Plan from the drop-down box.

3) Enter data for all required fields as indicated by the red dots. Narrow results by entering specific criteria in the additional fields: “DLN,” “Medicaid Number,” “Last Name,” “First Name,” “SSN,” “Form Status,” “From” and “To” Dates, and “Reason for Assessment.” Dates are searched against the TMHP Received Date (date of successful submission).

4) Click the “Search” button, and the LTC Online Portal will return any matching submissions (records).

Note: FSI search results will only display the Type of Form selected.
5) Click the View Detail link of the requested assessment to open and view the assessment.

<table>
<thead>
<tr>
<th>DLN</th>
<th>TMHP Received Date</th>
<th>SSN</th>
<th>Medicaid #</th>
<th>Medicare #</th>
<th>First Name</th>
<th>Last Name</th>
<th>Status</th>
<th>RUG</th>
<th>RN Signature Date</th>
<th>Purpose Code</th>
<th>Contract Number</th>
<th>Vendor Number</th>
<th>Reason for Assessment</th>
</tr>
</thead>
<tbody>
<tr>
<td>120</td>
<td>7/22/2013</td>
<td>7/22/2013</td>
<td>7/22/2013</td>
<td>7/22/2013</td>
<td>Processed/Complete</td>
<td>7/22/2013</td>
<td>11</td>
<td>01: Initial Assessment</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>120</td>
<td>7/24/2013</td>
<td>7/24/2013</td>
<td>7/24/2013</td>
<td>7/24/2013</td>
<td>Processed/Complete</td>
<td>7/24/2013</td>
<td>11</td>
<td>01: Initial Assessment</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>120</td>
<td>7/30/2013</td>
<td>7/30/2013</td>
<td>7/30/2013</td>
<td>7/30/2013</td>
<td>Processed/Complete</td>
<td>7/30/2013</td>
<td>11</td>
<td>01: Initial Assessment</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>120</td>
<td>7/31/2013</td>
<td>7/31/2013</td>
<td>7/31/2013</td>
<td>7/31/2013</td>
<td>Processed/Complete</td>
<td>7/31/2013</td>
<td>11</td>
<td>01: Initial Assessment</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Note:** FSI can retrieve information from the previous seven years. The search is based on the TMHP Received Date. There is a 50-record line limit for search results; therefore, you may need to narrow your search to retrieve specific records. Descriptions of the column headings seen above are:

- **View Detail:** The hyperlink used to open the assessment.
- **DLN:** The unique document locator number (DLN) assigned to each successfully submitted assessment.
- **TMHP Received Date:** The actual date the assessment was successfully submitted on the LTC Online Portal.
- **SSN:** (2.0: AA5a, 3.0: A0600A), Medicaid # (2.0: AA7, 3.0: A0700), Medicare # (2.0: AA5b, 3.0: A0600B), First Name and Last Name (2.0: AA1a and AA1c, 3.0: A0500A and A0500C): Information used to identify the individual associated with the assessment.
- **Status:** The status of the assessment at the time of the search.
- **RUG:** The assigned Resource Utilization Group (RUG) value.
- **RN Signature Date:** Date the assessment was completed as identified in field R2b for 2.0 Assessments and field Z0500B for 3.0 Assessments.
- **Purpose Code:** Utilization Review Assessment submitted by DADS.
- **Contract Number:** The nine-digit provider number.
- **Vendor Number:** The four-digit site identification number.
- **Reason for Assessment:** (2.0: AA8a, 3.0: A0310A):

<table>
<thead>
<tr>
<th>Waiver 2.0: MN/LOC Assessment</th>
<th>Waiver 3.0: MN/LOC Assessment</th>
</tr>
</thead>
<tbody>
<tr>
<td>AA8a = 01. Initial Assessment</td>
<td>AA8a = 01. Initial Assessment</td>
</tr>
<tr>
<td>AA8a = 02. Annual Assessment</td>
<td>AA8a = 03. Annual Assessment</td>
</tr>
<tr>
<td>AA8a = 03. Significant change in status assessment (SCSA)</td>
<td>AA8a = 04. Significant change in status assessment (SCSA)</td>
</tr>
</tbody>
</table>
Current Activity

The Current Activity feature allows users to view document submissions or status changes that have occurred within the last 14 calendar days. After 14 days, users must use the Power Search query tool to locate a document. Managed Care Organization (MCO) Portal users will be able to view forms and assessments submitted by a Nursing Facility (NF) or Hospice provider for members enrolled with that MCO.

Current Activity will display MDS 3.0 Comprehensive and Minimum Data Set (MDS) 3.0 Quarterly assessments in addition to Preadmission Screening and Resident Review (PASRR) Evaluations, PASRR Level 1 (PL1) Screening Forms, H1700-1: HCBS STAR+PLUS Waiver Individual Service Plan forms, and Forms 3071, 3074, 3618, and 3619.

1) Click the **Current Activity** link in the blue navigational bar. Some users may see an additional category labeled “Vendor Numbers - Submitted forms.” Whether or not that category is displayed is determined by your account permissions. Click the appropriate vendor number (if applicable).

**Note:** The initial Current Activity page will display a list of all vendor/contract numbers to which the user is linked.
2) Clicking the appropriate vendor number will display a summary of all document status changes within the last 14 calendar days.

<table>
<thead>
<tr>
<th>DLN</th>
<th>Received</th>
<th>Medicaid</th>
<th>SSN</th>
<th>Name</th>
<th>ISP From Date</th>
<th>ISP To Date</th>
<th>Status</th>
<th>County</th>
<th>Current SAS Response Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>DLN</td>
<td>4/7/2015 11:06:24 AM</td>
<td></td>
<td></td>
<td></td>
<td>2/1/2015 12:00:00 AM</td>
<td>2/1/2015 12:00:00 AM</td>
<td>PSU Action Required</td>
<td>Aransas</td>
<td></td>
</tr>
<tr>
<td>DLN</td>
<td>4/2/2015 11:04:38 AM</td>
<td></td>
<td></td>
<td></td>
<td>2/1/2015 12:00:00 AM</td>
<td>2/1/2015 12:00:00 AM</td>
<td>PSU Invalid/Complete</td>
<td>Aransas</td>
<td></td>
</tr>
<tr>
<td>DLN</td>
<td>4/29/2015 2:42:52 PM</td>
<td></td>
<td></td>
<td></td>
<td>4/1/2015 12:00:00 AM</td>
<td>3/31/2016 12:00:00 AM</td>
<td>Form Inactivated</td>
<td>Calhoun</td>
<td></td>
</tr>
<tr>
<td>DLN</td>
<td>4/29/2015 2:51:39 PM</td>
<td></td>
<td></td>
<td></td>
<td>4/1/2015 12:00:00 AM</td>
<td>3/31/2016 12:00:00 AM</td>
<td>Processed/Complete</td>
<td>Aransas</td>
<td></td>
</tr>
<tr>
<td>DLN</td>
<td>5/6/2015 3:41:54 PM</td>
<td></td>
<td></td>
<td></td>
<td>2/1/2015 12:00:00 AM</td>
<td>1/31/2016 12:00:00 AM</td>
<td>Pending PSU Review</td>
<td>Collin</td>
<td></td>
</tr>
</tbody>
</table>

3) Click the Document Locator Number (DLN) link to display the details of the document.

Users are able to sort the Current Activity results in a variety of ways. By clicking on the heading of a column, the user can choose to sort results by DLN, Received Date, Social Security number (SSN), Medicaid number, Name, Status, County, or Current SAS Response Code. When the user clicks on a column heading for the first time, it is sorted in ascending order. By clicking on the column heading a second time, the sort will change to descending order. Sorting will apply only within the form or assessment type where the header being clicked is located. MDS 3.0, and MDSQTR 3.0 are separate groups and column headings.

**Power Search**

Power Search is a query tool used for monitoring the status of forms and assessments that have already been successfully submitted, and can be used to search across all form and assessment types. Power Search is an advanced version of Form Status Inquiry (FSI) that is used by providers.

Power Search allows you to retrieve submissions so that you can:

- Locate forms and assessments.
- Research and review statuses.
- Export search results to Microsoft Excel™.

Power Search can be performed in a number of ways, such as:

- By Type of Form (must include date range).
- By Document Locator Number only (no other information needed).
- By Individual’s name (must include date range).
- By Social Security number (must include a date range).
- By Medicaid number (must include a date range).
- By Plan Code (must include a date range).
Power Search by Type of Form

From Power Search:

1) Click the **Power Search** link on the blue navigational bar.

2) Type of Form: Choose from the drop-down box. The information on the screen may change based on the type of form or assessment chosen.

   ![Power Search Screenshot]

   **Note:** If you choose a specific form or assessment type from the drop-down box, the search results will be limited to only that particular type of form or assessment. To search across all form and assessment types, leave the Type of Form drop-down box blank and fill in the required information as indicated by the red dots. You are still required to enter information as indicated by the red dots, plus the Medicaid and/or Contract Numbers.

3) Enter the From Date and To Date fields using the calendar icon (These are required fields). The date must be entered in the MM/DD/YYYY format.

   **Note:** H1700-1 forms can be searched into future dates. All other forms can only be searched up to the current date.

4) To narrow the search results, you can enter specific information about the Client or Vendor. This is an optional step as information does not have to be entered into all fields.
5) Another optional step is to check boxes and choose from the drop-down boxes next to the items in the Additional Criteria section. This will also help to narrow the search results.

![Additional Criteria](image1)

6) Click the “Search” button at the bottom left of the screen. A list of results grouped by form or assessment type is shown at the bottom of the screen. The listing may be sorted by clicking on the heading of a column for that group.

7) To display the details of a form or assessment, click the **DLN** link in the DLN column.

**Power Search by Document Locator Number (DLN)**

From Power Search:

1) Enter the DLN in the DLN field.

2) Click the “Search” button at the bottom left of the screen. The form or assessment will display.

![Search Options](image2)
Power Search by an Individual's First Name/Last Name

From Power Search:

1) To list all forms and assessments for an Individual, leave the Type of Form drop-down box blank.

2) Enter the From Date and To Date fields using the calendar icon (these are required fields). The date must be entered in the MM/DD/YYYY format.

3) Enter the Individual’s last name in the Last Name field and enter the first name in the First Name field.

4) When searching by an Individual’s name, a contract number is required. Enter the appropriate contract number.

5) Click the “Search” button at the bottom left of the screen. A list of results grouped by form or assessment type is shown at the very bottom of the screen.

6) To display the details of a form or assessment, click the DLN link in the DLN column. The listing may be sorted by clicking on the heading of a column for that group.
Power Search by Social Security Number

From Power Search:

1) Enter the From Date and To Date fields using the calendar icon (these are required fields). The date must be entered in the MM/DD/YYYY format.

2) Enter the Individual's Social Security Number (SSN) in the SSN field.

3) To narrow the search results, you can enter specific information about the Client or Vendor. This is an optional step as information does not have to be entered into all fields.

4) Another optional step is to check boxes and choose from the drop-down boxes next to the items in the Additional Criteria section. This will also help to narrow the search results.

5) Click the “Search” button at the bottom left of the screen. A list of results grouped by form or assessment type is shown at the very bottom of the screen.

6) To display the details of a form or assessment, click the DLN link in the DLN column.
Power Search by Medicaid Number

From Power Search:

1) Enter the From Date and To Date fields using the calendar icon (these are required fields). The date must be entered in the MM/DD/YYYY format.

2) Enter the Individual’s Medicaid Number in the Medicaid Number field.

3) To narrow the search results, enter specific information about the Client or Vendor. Use this when more refined details are needed. Only items with red dots are required.

4) Another optional step is to check boxes and choose from the drop-down boxes next to the items in the Additional Criteria section. This will also help to narrow the search results.

5) Click the “Search” button at the bottom left of the screen. A list of results grouped by form or assessment type is shown at the very bottom of the screen.

6) To display the details of a form or assessment, click the DLN link in the DLN column.
**Power Search by Code Plan**

From Power Search:

1) Select the type of form from the drop down menu.

2) Enter the From Date and To Date fields using the calendar icon (these are required fields). The date must be entered in the MM/DD/YYYY format.

3) Select a Plan Code from the drop down menu in the Vendor section of the search criteria.

4) To narrow the search results, enter specific information about the Client or Vendor. Use this when more refined details are needed. Only items with red dots are required.
5) Another optional step is to check boxes and choose from the drop-down boxes next to the items in the Additional Criteria section. This will also help to narrow the search results.

6) Click the “Search” button at the bottom left of the screen. A list of results grouped by form or assessment type is shown at the very bottom of the screen.

7) To display the details of a form or assessment, click the DLN link in the DLN column.

Creating a Saved Search of Regularly Used Criteria

Instead of having to recreate searches of criteria used on a regular basis, users can create a Saved Search. A Saved Search can save your frequently used search criteria.

From Power Search:

1) Type of Form: Choose from the drop-down box. (However, if you do not want to limit your Saved Search to just one type of form or assessment, do not choose from the drop-down box.

   **Note:** The information on the screen will change based on the type of form or assessment.

2) Enter the From Date and To Date fields using the calendar icon (these are required fields). The date must be entered in the MM/DD/YYYY format.

3) As an optional step, you can enter specific information about the Client or Vendor.

4) Another optional step is to check boxes and choose from the drop-down boxes next to the items in the Additional Criteria section. This is where you would most likely enter frequently used search criteria to create a meaningful Saved Search.

5) In the Search Options section at the bottom of the screen, go to the Search Name field, enter a search name that will have meaning to you as a saved Saved Search for later use.

6) Click the “Save Search” button at the bottom right of the screen.
Search Limitations

There are search limitations to be aware of, these include:

- The From Date and To Date are required fields.
- Search results are limited to 250 displayed at a time (User can choose the next page under the Results section to browse through the next 250 records).
- Data is stored on the LTC Online Portal for seven years.
- An MCO will only be allowed to search for forms and assessments associated with their active members.
- When an NF resident transfers from one MCO to another MCO, the receiving MCO will be allowed to view forms and assessments for their new member up to and including 13 months prior to the start date.
- Search results may include the following forms or assessments: MDS 3.0 Comprehensive and MDS 3.0 quarterly assessments, PL1 Screening Forms, PASRR Evaluations, and forms H1700-1, 3071, 3074, 3618, and 3619.

My Searches

The My Searches feature allows you to access previously saved searches.

1) Click the My Searches link on the blue navigational bar.

2) The My Searches page displays. The searches you have saved are listed under the My Saved Searches heading.
3) You will have three choices:
   a) Click the **Remove** link to delete a saved search.
   
   b) Click the **Open** link to open the predefined Power Search screen. The fields on the Power Search screen will contain the information that was saved when the search was created, with the exception of the “To Date.” The “To Date” will automatically update to the current date.
   
   c) Click the **Work Results** link to open the first form or assessment to be worked.

Upon opening, the document becomes automatically locked by the viewer and will remain locked for 20 minutes if there is no activity or until the viewer clicks the “UnLock Form” button. The UnLock Form button will unlock the document so that a different user can make changes. If a document is locked, others will not be able to make changes or add additional information. You may be asked to unlock a document if you are seeking assistance from TMHP or the Department of Aging and Disability Services (DADS). To unlock a document, click the “UnLock Form” button located at the top right corner of the screen.

The Work Results function displays forms in sequence, and includes the standard Yellow Form Actions Bar options “Print,” and “Add Note,” which we will cover shortly. Once you have added a note or when you wish to proceed to the next form, you can click “Skip Form” to proceed to the next form or assessment in the search list.

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**Letters**

**Letter Search**

The Letter Search feature allows you to find letters that have been created for a provider, Individual, or legally authorized representative (LAR). Only users with the necessary security profile have access to the Letter Search feature.
Performing a Letter Search

1) Click the **Letters** link on the blue navigational bar to open the Letter Search page.

2) Enter the Vendor Number/Contract Number, and From Date and To Date fields using the calendar icon. These are required fields. The date must be entered in the MM/DD/YYYY format. You must also enter one of the following criteria:
   - Medicaid Number
   - Social Security Number
   - Last Name and First Name

Although letters do not have DLNs, you can search by the DLN of an Individual’s form or assessment to access letters associated with the form or assessment and the Individual. The date field does not need to be entered for a search by DLN.
3) Enter the From Date and To Date fields using the calendar icon (these are required fields). The date must be entered in the MM/DD/YYYY format.

4) Click the “Search” button at the bottom of the screen.

5) The results of the search are shown at the bottom of the screen. The results display is limited to 100 records at a time. If there are more than 100 records found, only the first 100 records are displayed. If the record being searched for is not displayed in the first 100 records, enter additional search criteria to further limit the search. If there are no results, the “No Results” message is displayed.
6) To view the details of an individual letter, click the **View Letter** link in the first column of the results.

![Table of letters](image)

**H2065-D/DS Notifications**

MCO users can use the Letters search to find H2065-D/DS Notifications associated with a particular ISP form. The H2065-D/DS Notification is used by Program Services Unit (PSU) staff to communicate information about STAR+PLUS Program Services. Once located, these notifications can be printed out, or saved in Adobe PDF format.

Initial forms that were processed successfully will set to status **Processed/Complete** or **PSU Processed/Complete** once PSU staff generates the accompanying H2065-D/DS notification.

![H2065-D/DS Notification example](image)
Yellow Form Actions Bar

The yellow Form Actions bar displayed at the top of a form or assessment provides options that allow you to take an action on a form or assessment. Options will vary depending on your security level, the type of form or assessment, as well as the form or assessment status. The yellow Form Actions bar is available when a form or assessment is being viewed in detail.

Print

Use the Print feature to print a hard copy of completed forms and assessments. Click the “Print” button to print the form or assessment. The “Print” button is available in all statuses, as well as prior to form or assessment submission. When you click the “Print” button, the LTC Online Portal displays the form or assessment data in a Portable Document Format (PDF) document.

Note: When printing a form or assessment, the Individual’s name will be auto populated on the top right corner of each page. The DLN will be on the top left corner of the page.

Use as Template

Use the Use as Template feature to open a form populated with information from a previous version. You can use this function to resubmit forms with edited information.

Form Inactivate

To be eligible for inactivation, the form must be set to status: MCO Action Required, PSU Action Required, or Pending PSU Review. A form is no longer eligible to be inactivated once it is set to status: Processed/Complete.

Click the “Form Inactivate” button on the yellow Form Actions bar.

A note of the inactivation will be added to the form’s History trail.

Note: If a form has been set to status: MCO Action Required for more than 45 days, it will automatically be inactivated.
Add Note

The Add Note feature may be used to add information to the History trail of the form or assessment, not to the form or assessment itself (i.e., not added to the Comments). When you add a note, the LTC Online Portal inserts your Username and the date. The Add Note feature is always available (unless the form or assessment is locked by another user).

Note: Once a note has been saved it cannot be corrected or deleted.

To add a note to a submitted form or assessment:

1) Locate the form or assessment using Power Search.
2) Click the “Add Note” button. A text box will open.
3) Enter information (up to 500 characters).
4) You will have two choices:
   a) Click the “Save” button to save your note.
      Or
   b) Click the “Cancel” button to erase your note.
H1700 / Individual Service Plan (ISP) Form

What is the ISP Form?
The H1700-1: HCBS STAR+PLUS Waiver Individual Service Plan (ISP) form is used in Medicaid Waiver programs. These forms can be submitted online using the LTC Online Portal. Before an ISP can be submitted for an individual, they must have a Medical Necessity and Level of Care (MN/LOC) assessment on file in status "Processed/Complete" or "CS Processed/Complete."

Benefits of Submitting ISP Forms on the LTC Online Portal
- Many fields auto-populate with information from an individual's MN/LOC.
- Track forms with Form Status Inquiry.
- 24/7 availability
- Texas Medicaid & Healthcare Partnership (TMHP) provides LTC Online Portal technical support by telephone at 1-800-626-4117, Option 3, from 7:00 a.m. – 7:00 p.m., Central Time, Monday through Friday – excluding holidays.

Submitting an ISP
1) When the blue navigational bar is displayed, click the Submit Form link.
2) You may need to reenter your security credentials.
3) From the “Type of Form” drop-down menu, select “H1700-1 HCBS STAR+PLUS Waiver Individual Service Plan."

4) Select the appropriate vendor or contract number, if applicable.

5) Enter the individual’s Medicaid number in the Medicaid Number field.
6) Click the “Enter Form” button in the bottom right corner of the screen. The form will appear.

The form may take a moment to populate fields from the individual’s MN/LOC. You will not be able to edit the auto-populated fields, which are tinted gray.

Required fields are indicated by a red dot.

The form sections of the ISP are:
- MCO Organization Information;
- Applicant/Member Information;
- Individual Service Plan Event; and
- Individual Service Plan Services.
Completing the H1700 / ISP Form Fields

1) Complete the “Service Coordinator” field.

2) Select the correct county from the “County” drop-down menu.

Note: Most of the Applicant/Member section of the ISP form will be auto-populated using information from the MN/LOC on file for that individual.

3) In the Applicant/Member section of the form, verify that the Medicaid number is correct. It is a required field.

4) Check the ME-Waiver box, if applicable, for the individual.

Note: The “Type Authorization” indicates whether the current ISP will be submitted as an Initial ISP or a Reassessment. This field automatically determines whether the ISP is an Initial or a Reassessment based on the dates entered below and whether or not the individual has an existing ISP on file. If the ISP has been out of date for 120 days, it resets to an “Initial” assessment. Backdating is possible; this makes it possible to submit the ISP as a Reassessment instead of an Initial Assessment. Backdating must go back far enough to fall within the 120 day reassessment window, and appropriate 1913s will be SAS generated for backdated months. 1912s will be SAS generated for upcoming months.

Example: If the MCO submits an ISP on June 15 2015 (the effective date on the form) and the ISP From Date on the reassessment of the ISP is July 1 2015, then SAS will create one record: a 19/12 (on time) for June 1 2015 through May 31 2016. However, if an MCO submits an ISP on June 15 2015 (the effective date on the form) and the ISP From Date on the reassessment of the ISP is June 1 2015, then SAS will create two records. A 19/13 (late) for June 1 through June 30 2015; and a 19/12 for July 1 2015 through May 31 2016.
5) Enter the “ISP From Date.” You can complete the “ISP From Date” field using the interactive calendar. The “ISP From Date” must be the first day of a selected month. For Initial forms the portal will auto-populate the first day of the following month.

The ISP expires one calendar year after the “ISP From Date.” The “ISP To Date” cannot be edited and will auto-populate based on the editable “ISP From Date” field. For a reassessment, the “ISP From Date” must be the day after the previous “ISP To Date,” or the form will not submit properly.

**Note:** Initial forms for ME-Waiver will automatically trigger review by Health and Human Services Commission (HHSC) staff.

6) Choose the appropriate option from the required “Enrolled From” drop-down menu.

7) Check the MFPD box if the applicant/member qualifies for a Money Follows Person demonstration.

8) Choose the appropriate option from the required “Living Arrangement after Entry into SPW” field.

![Individual Service Plan Event](image)

**Note:** The final section on the ISP form is titled “Individual Service Plan Services.” This is a required section. You must enter at least one service to submit the ISP.

9) To enter a service:
   - Use the drop-down menu to select the appropriate option in the “Delivery Option” column.
   - Based on your selection, a new drop-down menu will populate in the required “Service Category” column. Use it to select the correct Service Category.

**Note:** Once a Service Category has been selected, it will no longer be available on the Service Category list when adding additional Service rows.

10) Complete the required “Estimated Annual Service Units” column.
11) Complete the required “Rate” column.

12) The “Estimated Annual Cost” column will auto-populate.

13) Add new Service Categories as necessary.

**Note:** To add additional Service Categories, click the “Add Service” button and repeat the steps above. When multiple Service rows exist, a new column will appear on the right hand side of the screen and each Service row will have a “Delete Service” button. Clicking the “Delete Service” button will instantly delete that Service row. If you erroneously delete a Service row, you will need to click the “Add Service” button and re-enter the information.

14) Select an option from the required “Ventilator Use” drop-down menu.

**Note:** If the “Total Estimated Waiver Cost” exceeds the “Annual Cost Limit,” a new checkbox titled “Over Annual Cost Limit override with GR approval” will appear. If this box is present, it must be selected before the form can be submitted. Please note that this will automatically flag the ISP for review by HHSC staff.

15) Click the “Submit Form” button at the bottom right of the screen.

**Note:** If the ISP is flagged for review by HHSC staff, it can be tracked using the Form Status Inquiry (FSI) or Power Search tools on the blue navigational bar. Additionally, submitted ISPs may be found for 14 calendar days by clicking the **Current Activity** link on the blue navigational bar.
Submitting Individual ISP forms by Multiple Users

Occasionally, multiple users may need to input data on an ISP form prior to submission. This can be accomplished by using the “Save as Draft” function at the top of the form.

1) Fill out as many fields on the ISP form as possible using the steps described above.

2) Instead of clicking “Submit Form,” scroll back to the top of the form and Click the “Save as Draft” button.

3) The ISP will now be available on the Drafts page.

4) Other users linked to that contract may now access the ISP form by clicking the “Drafts” link on the blue navigational bar.

5) Once the form is completed, it can be submitted by following the steps described above.

Note: The LTC Online Portal only supports single ISP form submissions. For users attempting to submit ISP forms in batches, use the existing batch transaction process using one of the following naming conventions: ISP*.txt; ISP*.dat; or ISP*.zip.
How to Inactivate a Form

If HHSC Program Services Unit (PSU) staff set the form status to *MCO Action Required*, an MCO User should inactivate the form.

1) Log in to the LTC Online Portal.

2) Locate the form you wish to inactivate using the **Form Status Inquiry**, **Current Activity**, or **Power Search** links in the blue navigational bar.
   a) If using FSI or Power Search, you may search for Form H1700-1 using SSN, Medicaid number, or DLN. Click the “Search” button, then click the **DLN** link.
   b) If using Current Activity, click the **DLN** link.

3) To be eligible for inactivation, the form must be set to status: *MCO Action Required*, *PSU Action Required*, or *Pending PSU Review*.

4) Click the “Form Inactivate” button on the yellow Form Actions bar.

5) A note will be added to the form History trail.

**Note:** A form is no longer eligible to be inactivated once it is set to status: *Processed/Complete* or *PSU Processed/Complete*. Forms will be automatically inactivated after 45 days in status: *MCO Action Required*. 
How to Resubmit a Form

1) Inactivate the form using the steps above.

2) Click the “Use as Template” button on the yellow Form Actions bar.

3) Edit the form as necessary using the process described in this User Guide.

4) Click the “Submit” button at the bottom right of the screen to submit the form.

How to Terminate a Form

MCO users may not Terminate their own forms.

Forms set to status Processed/Complete or PSU Processed/Complete can be Terminated by Program Services Unit (PSU) staff at HHSC.
Resource Information

Helpful Contact Information

**Texas Medicaid & Healthcare Partnership (TMHP)**

General Customer Service ................................................................. 1-800-925-9126

Long Term Care (LTC) Department..................................................... 1-800-727-5436 / 1-800-626-4117
   General Inquiries, MDS not in the LTC Online Portal, LTCMI questions, Claim Forms,
   Claim Submission, R&S Report, PL1 Screening Form .................................. Option 1
   Medical Necessity ............................................................................. Option 2
   Technical Support ............................................................................ Option 3
   Fair Hearing ................................................................................ Option 5
   LTC Other Insurance Information and Updates ...................................... Option 6

LTC Department (fax) ........................................................................ (512) 514-4223

Medicaid Hotline ............................................................................. 1-800-252-8263

**Department of Aging and Disability Services (DADS)** ..................... (512) 438-3011

Consumer Rights & Services Hotline .................................................. 1-800-458-9858
   Complaint for LTC Facility/Agency ..................................................... Option 2
   Information About a Facility .............................................................. Option 4
   Provider Self-Reported Incidents ....................................................... Option 5
   Survey Documents/DADS literature ................................................ Option 6

Community Services Contracts Unit Support ...................................... (512) 438-2080

Community Services Contracts Voice Mail (Contract Applications,
   Reenrollments and Reporting Changes, such as address and telephone number) ................................................. (512) 438-3550

Criminal History Checks .................................................................. (512) 438-2363

Facility Licensure/Certification (Reporting Changes, such as Service Area and Medical Director) ......................... (512) 438-2630

Home and Community Support Services Unit (Hospice Regulatory Requirements) ............................................... (512) 438-3161

Hospice Policy (Medicaid, Program Support, and Special Services Unit) ................................................................. hospice@dads.state.tx.us

Institutional Services Contracting ....................................................... (512) 438-2546

Medication Aide Program ................................................................ (512) 231-5800

Nurse Aide Registry ........................................................................ 1-800-452-3934

Nurse Aide Training .......................................................................... (512) 231-5800

NF Administrator Program ............................................................... (512) 231-5800

NF Policy ......................................................................................... (512) 438-3161
PASRR Unit Policy Questions .................................................................................................................. 1-855-435-7180
Regulatory Services ............................................................................................................................... (512) 438-2625
Provider Claims ....................................................................................................................................... (512) 438-2200
  NF and Hospice (Client Service authorizations, MESAV updates, and unable to determine Rate Key issues) .................................................................................................................. Option 1
  Personal Needs Allowance Payments (PNA) .......................................................................................... Option 2
  Deductions and Holds .......................................................................................................................... Option 3
  Third Party Recovery ............................................................................................................................ Option 4
  Home Community Services ................................................................................................................ Option 5
  TX Home Living ..................................................................................................................................... Option 5
  Rehabilitative and Specialized Services ................................................................................................. Option 6
  NF Dental/Rehab Services .................................................................................................................... Option 6

Health and Human Services (HHSC)
HHSC Ombudsman Office Medicaid Benefits ......................................................................................... 1-877-787-8999
Medicaid Fraud ......................................................................................................................................... 1-800-436-6184
Rate Analysis ............................................................................................................................................ (512) 491-1376
Resource Utilization Groups (RUGs) Information
  Nurse Specialist (Reconsideration & RUGs) ........................................................................................ (512) 491-1750
  (512) 491-2074
  (512) 491-2030
Texas State University RUG Training Information ................................................................................... (512) 245-7118
Texas State University Training Online Course Questions ........................................................................... (512) 245-7118

Informational Websites
Texas Medicaid & Healthcare Partnership (TMHP): www.tmhp.com
  • HIPAA information: www.tmhp.com/Pages/TMHP/TMHP_HIPAA.aspx
  • Long Term Care Division: www.tmhp.com/Pages/LTC/ltc_home.aspx
  • NF LTCMI and PASRR information is also available at: www.tmhp.com/Pages/LTC/ltc_home.aspx

Note: Instructions for providers on how to access clarification notices posted on LTC TMHP website:
www.tmhp.com/Pages/LTC/ltc_home.aspx

Texas Department of Aging and Disability Services (DADS): www.dads.state.tx.us/
All DADS provider information can be found at www.dads.state.tx.us/providers/index.cfm. Please choose your particular provider type for available online resources:
  • Assisted Living: www.dads.state.tx.us/providers/alf/index.cfm
  • Consumer Rights and Services (includes information about how to make a complaint):
    www.dads.state.tx.us/services/crs/index.html
  • DADS Provider Claims Services: https://hhsporal.hhs.state.tx.us/wps/portal
  • Handbooks: www.dads.state.tx.us/news_info/publications/handbooks/index.html#handbooks
  • Nursing Facility: www.dads.state.tx.us/providers/nf/index.cfm
• Nursing Facility MDS Coordinator Support Site: http://qmweb.dads.state.tx.us/mdsweb/#ovr
• PASRR: www.dads.state.tx.us/providers/pasrr/index.cfm
• Provider Letters: www.dads.state.tx.us/providers/communications/letters.cfm such as: 2011-128, 2011-38, 2010-89, and 0927
• Resources for DADS Service Providers: www.dads.state.tx.us/providers/index.cfm

**Department of State Health Services (DSHS):** www.dshs.state.tx.us/
• DSHS Local Mental Health Authority Search: www.dshs.state.tx.us/mhservices-search
• DSHS PASRR Information: www.dshs.state.tx.us/mhsa/pasrr/

**Health and Human Services Commission (HHSC):** www.hhsc.state.tx.us/index.shtml
• HHSC Regions: www.hhsc.state.tx.us/research/dssi/brt/IM0.pdf
• Vendor Drug Program: www.hhsc.state.tx.us/hcf/vdp/vdpstart.html

**Other**
• Centers for Medicare & Medicaid Services: www.cms.gov
• Department of State Health Services: www.dshs.state.tx.us
• National Provider Identifier (NPI):
  – To obtain: https://nppes.cms.hhs.gov/NPPES
  – Inform DADS: www.dads.state.tx.us/providers/hipaa/forms.html
• Texas Administrative Code: www.sos.state.tx.us/tac/index.shtml
• Texas State RUG Training: www.txstate.edu/continuinged/professional-development/PD-Online/RUG-Training.html
• Federal MDS 3.0 site: www.cms.gov/NursingHomeQualityInits/25_NHQIMDS30.asp
The LTC Online Portal Guide for MCOs is produced by TMHP Training Services. Contents are current as of the time of publishing and subject to change. Providers should always refer to the TMHP and DADS websites for current and authoritative information.
Power Search Results Addendum

Power Search results display LIDDA/LMHA Vendor and Contract Numbers and LIDDA/LMHA Signature Dates. These fields will display when exported to Microsoft Excel™ when searching for PL1 form type across form type searches.

This will allow Power Search users to utilize IDT and PL1 data for reporting and quality monitoring.

### Power Search Results Page

<table>
<thead>
<tr>
<th>PASRR Eligibility</th>
<th>MI Vendor Number</th>
<th>MI Contract Number</th>
<th>IDD Vendor Number</th>
<th>IDD Contract Number</th>
<th>Plan Code</th>
<th>Date of IDT Meeting</th>
<th>LMHA Sign Date</th>
<th>LIDDA Sign Date</th>
<th>Habilitation Discussion</th>
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</table>
Effective June 24, 2016, a new field labelled “Associated Vendor Number” will be displayed in the Additional Criteria section of Power Search so that Power Search users can perform searches by non-submitter Vendor Numbers for PL1, PE, and PSS forms.

To search by Associated Vendor Number, enter a vendor number (Submitter/Non-Submitter) in the Associated Vendor Number field displayed in the Additional Criteria section of Power Search. Enter values for all required fields as indicated by the red dots and click the “Search” button.