

Training Objectives (Table of Contents)

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- · Creating the LTC-2A, Notification of Admission and OCCO Processing
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- · LTC-2F, Notice of Discharge
- Correcting Record Errors
- · Options Counseling Considerations
- · General Reminders and Phase II Implementation Timeline





NJ Nursing Facility Regulations

- N.J.A.C. 10:166-1.8(c.) provides that "Within two working days of a NF"s admission of an individual who is financially eligible for Medicaid or those who are potentially eligible within 180 days, the NF shall submit a completed Notification From Long-Term Care Facility of the Admission or Termination of a Medicaid Patient, also known as an LTC-2 form."
- N.J.A.C. 10:166-1.8(d.1.) For each NF applicant with MI or ID/DD whose standardized assessment and PAS results in a determination that the individual is clinically eligible for NF placement, the DMHS or the DDD, as appropriate, will conduct PASRR evaluation and determination, prior to the Department"s issuance of a written determination authorizing NF placement.

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PASRR Federal Law: Title 42:483.100-138

- This law mandates that all Medicaid Certified Nursing Facilities (NF) may not admit an individual with serious mental illness (MI), intellectual, developmental disability (ID/DD) or a related condition (RC) unless the individual has been properly screened, evaluated, and determined to be appropriate for NF placement regardless of payment source.
 - The intent of the PASRR process is to protect these individuals from inappropriate placement in a NF.
- The NF holds the responsibility for ensuring completion of the PASRR prior to a resident's admission, or when indicated as a Resident Review for active admissions.
 - Failure to comply with PASRR requirements will impact Medicaid reimbursement.

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Looking Back: Phase I Implementation of the LTC-2 (NF) Portal

Salesforce Application

Phase I Timeline

Goals

Challenges

Salesforce Application



- Phase I implementation: Salesforce Classic version
- Cloud-based software application
 - · Operates within the Government Cloud
 - HIPAA compliant
 - · Registration process
 - User roles limit access to various portal functionality and submission of specific request types
- Real-time processing and notifications
 - · Available 24/7 to registered users
 - OCCO actions visible to providers
 - · Automated email alerts/notifications for OCCO processing actions
 - · Alerts 1) user who created request and 2) general organizational email



Phase I NF Portal Implementation - TIMELINE

- November 2022 Phase I implementation of the NF Portal
 - · LTC-2A, Notice of Admission
 - LTC-2B, Request for Clinical Eligibility Assessment
 - LTC-2F, Notice of Discharge
 - Existing LTC residents not included unless a LTC-2B initiated (Private to Medicaid).
- November 2023 mandated 100% registration/use by NF providers
 - All new NF admissions required to be reported via portal.
 - Email submissions not accepted.

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Goals of Phase I Implementation

- Implementation of 3 types of primary referrals:
 - · LTC-2A, Notice of Admission
 - LTC-2B, Request for OCCO Clinical Assessment
 - · LTC-2F, Notice of Discharge
- Streamlined processes for handling LTC-2 submissions to OCCO.
- Provided real-time access to current LTC-2 status and OCCO outcomes
- Allowed NF users to get acclimated to NF Portal functionality and benefits with initial basic functionality
- Feedback from both providers and OCCO staff has been positive

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Phase I Challenges

- NF users not familiar with portal processes or submission requirements
 - Users not accessing available educational materials via the DoAS website
 - · Medicaid billing issues if LTC-2B not requested
- Frequent NF user and provider updates due to staff turnover and password resets
 - Requires DoAS staffing to maintain daily support
- LTC-2A submissions not occurring for all new admissions regardless of payer source
 - · EARC not being requested from hospital
 - · If EARC exists, not being identified and linked by LTC-2A submitter
- LTC-2F, Notice of Discharge not submitted or delayed
 - · Impacts ability of new admitting NF to create timely LTC-2 portal records

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Phase I Challenges

- Inappropriate LTC-2B Request for Clinical Assessment submissions
 - Submission of requests for residents who are MCO enrolled or not seeking Medicaid eligibility.
 - As per N.J.A.C., NF providers are required to check MEVs, verify Medicaid enrollment status, and discuss with resident/legal representative Medicaid eligibility considerations to determine appropriateness of clinical eligibility referral and LTC-2B submission.
 - · Resubmission of inappropriate requests.
 - NF users/billing agents not reviewing LTC-2B status detail for reason of Inappropriate Referral case status and resubmitting same request again – either manually or via batch processing in the portal.

The high volume of inappropriate referrals delays OCCO's ability to process appropriate LTC-2B requests.

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2024 Nursing Facility LTC-2B Submissions

Total 2024 Nursing Facility LTC-2B Submissions: #62,239

- Total Inappropriate LTC-2B Referrals: #42,280
 - Valid Assessment on File: 5,393
 - o MCO or PACE Enrolled: 33,652
 - Other (duplicate, expired, discharged, etc.): 3,074
- Total Assigned LTC-2B Referrals, Completed with OCCO Outcomes: #19,962
 - o Approvals: 8943
 - o Withdrawals: 459
 - o Dismissals (expired, discharged, etc.): 10,349
 - o Denials: 35
 - o Section Q Only: 176

Total 2024 OCCO Approved NF Assessment Outcomes: CURRENT MEDICAID ELIGIBILITY STATUS (as of 4/2/2025)

- Total 2024 OCCO Approved Assessment Outcomes: #8943
 - o Active: 2580
 - o Not Active: 38
 - o Not on Medicaid: 6325

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Salesforce Application

- Salesforce Lightning Version
 - Increased HIPAA compliance
 - Improved visual presentation
 - Increased functionality
 - · Request types, Case status and Grid column searches
 - Export to Excel functionality
 - Increased automated processes

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Revised/Expanded LTC-2 Request Types

- LTC-2B, Request for Clinical Assessment (REVISED request types)
- LTC-2C, Notice of Disenrollment (Expected Phase III)
- LTC-2D, Section Q Referral (Expected Phase III)
- LTC-2E, NF Clinical Screen (NFCS) (NEW)
 - · Completed by direct facility staff; NF Billing Agents are not permitted to complete this request type.
 - Requires access to CMS MDS system
 - Options Counseling discussion with resident or representative required to discuss Medicaid eligibility needs, desire to access Medicaid, and agreement to proceed with the LTC-2E, NFCS.



Changes to User Profiles - PHASE II Implementation

3 NF Portal, User Profile Types:

- 1. NF user
- 2. SCNF user
- 3. NF Billing Agent user
- With our Phase II implementation, user profiles are being refined.
- The LTC-2E, NF Clinical Screen is not applicable to residents residing in or seeking transfer to a SCNF.
- Only direct NF staff will have ability to initiate and complete the LTC-2E, NF Clinical
 - LTC-2E requires access to recent MDS; communication with resident/representative for options counseling and next steps.
 - · NF Billing Agents will have view only access

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LTC-2 (NF) Portal User Profiles

PROFILE	LTC-2A Notice of Admission	LTC-2B Request for Clinical Eligibility Assessment	LTC-2C Notice of Disenrollment (Phase III)	LTC-2D Section Q Referral (Phase III)	LTC-2E NF Clinical Screen	LTC-2F Notice of Discharge
NF User	✓	✓	✓	✓	✓	✓
SCNF User	✓	✓	✓	✓	N/A	✓
NF Billing Agent User	✓	✓	✓	View Only	View Only	✓
OCCO User	✓	✓	✓	✓	✓	✓
OCCO User w/Admin.	✓	✓	✓	✓	✓	✓

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Registering For and Accessing the LTC-2 (NF) Portal

ISR/Initial Access Requests/Provider Updates

Generic Login

Forgot Password/Password reset process

Deactivation/Reactivation Process

Information Security Representative (ISR) Form (SF-2)

- The ISR form (SF-1) establishes the facility credentials for portal setup and ISR for subsequent user request forms.
 - · Must be direct NF staff, not NF billing agent staff.
 - · Changes to ISR designation require resubmission of the SF-1.
 - IDs organizational email for secondary portal notifications (Important)
 - If necessary, outreach NF Portal Support to inquire who is currently identified as the facility ISR.
- The ISR form designates a minimum of one individual within the NF organization who has the authority to request new user access and/or user reactivation.
 - Up to 2 ISRs can be designated.
- The form must be signed off by a senior level employee (i.e. NF Administrator, HR Manager) who has the authority to designate an ISR for the organization and will not be a user of the portal.

ALL FORMS MUST BE ELECTRONICALLY COMPLETED

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NF Portal User Access Request (SF-2)

- The Portal User Access Request Form (SF-2) must be completed electronically and signed by the individual in need of initial or reactivation for NF portal access.
- If NF user requires access to multiple provider accounts, a SP-2 must be received for each account.
- NOTE: 3 unique employee signatures are required on the user access form (no overlap permitted) user, supervisor and ISR.
- Once processed, request sent to Salesforce who then establishes the user profile and emails
 the applicable user containing the initial access link.
 - After initial access, reactivation or password reset, only the generic portal login link should be utilized to access the portal.

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SAMPLE: User Email Notification – Initial Portal Access

Within 2 business days of request for user portal access, an email notification is forwarded. This
email will include a "one time use" link for the user to establish their initial access to the portal.
Sample email:

```
From: noreply@salesforce.com <noreply@salesforce.com> on behalf of Worker Portal <njsave.noreply@dhs.state.nj.us>
Sent: Thursday, July 9, 2020 8:13 AM
To: XXXXXXXXXX
Subject: Welcome to Worker Portal

Hi XXXXX
Welcome to Worker Portal! To get started, go to https://urldefense.com/v3/ https://nidoas-
ua.force.com/wp/login?c=tr/Z600LSvGUljXsnl3EeDVyegzHe*2Bhjis9PQFYu*2BqTDA5xtlY1w9bEcFMACXppCV0N1HmarVleeQbdFH0LC
eziRpo4E*2F0K0oosfVibLwOmvkoV29f4RDG*2BjMrdXci/294jm2kCSWF*2Bbgfn5fp8MiUJFXtWY0bPeqQi0OC8Y1LammyEkY96RDuV*2Fi
esU30UAN4*3D ;JSUIJSUIJQIIA zLIUo7uN0IXps1ehOelNOpR WbANpMQNcUcZpEtv7vVVigmpbwXr3x4G79UvzK974lf4SAkcPZluVF1
SZjsw$

Username: XXXXXXXI(specific user email)
Thanks,
NJ DoAS
```

IMPORTANT: This link is only active for 24 hours. Users are required to take immediate action to initialize
their user access upon receipt. If an email is expected but does not appear to have arrived, check the
"JUNK" mailbox since this is the first email received from Salesforce.

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Portal User IDs

- User IDs typically include the user email address.
 - If more than one provider type for the facility or multiple provider accounts, the backend of the ID will be differentiated to assist the user
 - e.g., <u>Dfreundlich@facilityname.com.nf</u>; <u>Dfreundlich@facilityname.com.scnf</u>
- Users may find it useful to check "Remember Me" when logging in to avoid the need to input the User ID.
 - Users with more than one user may then utilize the drop-down selection, which allows the user to choose the applicable provider account.

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Provider Profile Change Requests (SF-3)

- Any changes in provider detail may only be conducted via submission of the SF-3 (electronically completed).
 - · Important process to avoid Medicaid billing issues.
- · Changes may include:
 - Provider Name
 - · Medicaid Provider Number
 - Address
 - Telephone
 - · Organizational email
- Once received, all existing portal records will be updated to include the applicable changes.

ALL FORMS MUST BE ELECTRONICALLY COMPLETED

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Submission of SF Portal Registration Forms

- · All forms must be:
 - · Completed in full, electronically (typed, not handwritten).
 - · Handwritten forms will be returned and resubmission required.
 - · Include all required signatures
 - · Manual signatures will be accepted
 - · Forwarded to the Doas NF Portal Support email only
 - DoAS-NFPortal.Registration@dhs.nj.gov
- Upon receipt, if the forms are in order and accepted, the request will be processed and submitted to Salesforce for next steps.

NOTE: These forms are utilized for all DoAS-OCCO portals. Send to NF Portal Registration email only. Do not include EARC or NJ Choice Portal Support emails



Generic NF Portal Login Link

- All users regardless of profile access the portal through a generic link after initial access, reactivation or password reset request:
 - · https://njdoas-ua.force.com/wp
 - · Save to favorites or other area for easy access.
- Any emailed access link is intended as a one-time use.
 - · Initial Access email
 - · Reactivation email
 - · Password Reset email
- Accessing the portal with a previously provided emailed link will not provide full portal functionality.

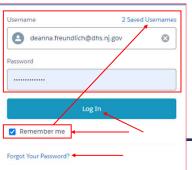
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Portal Login

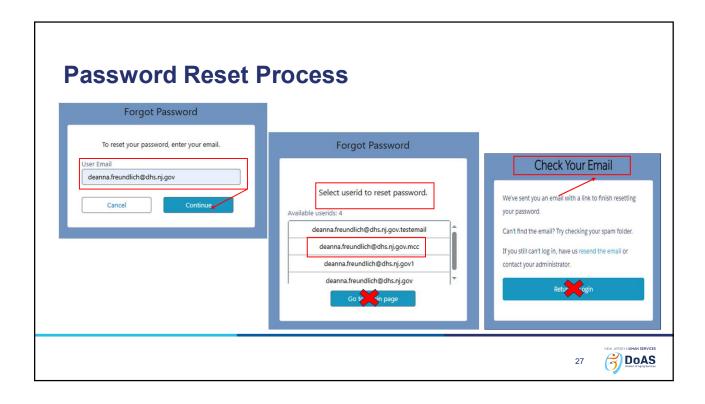
- Utilizing https://njdoas-ua.force.com/wp, the user must input their "username" and "Password".
 - Click the "Remember Me" box prior to clicking "Log In" to allow the user name to auto-populate during a subsequent login.
- Following three unsuccessful login attempts, a user will be locked out of the login process for 15 minutes. After 15 minutes, the user can request a password reset to avoid further access issues.



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Portal Password Reset Process

- If user is unable to access the application after two failed login attempts, it is
 <u>strongly encouraged</u> that the user conduct a <u>password reset</u> to avoid a
 lockout period, and/or need for Portal Support intervention.
 - 1. From the login box, click "Forgot my password" to initiate the reset process.
 - 2. In this first dialogue box, enter the user <u>employee</u> email used to register for portal access (not user ID); Then click "**Continue**".
 - 3. In the second dialogue box, locate and click the applicable user ID that needs a reset.
 - 4. A third dialogue box will appear, directing the user to their employee email to access the password reset link.
 - **IMPORTANT:** Do not click "Return to Login" and reattempt access to avoid continued issues!
 - 5. Check for email and once received click the password reset link.



Password Recovery Email

- This link is only valid for 24 hours
 - Access links for one-time portal access only; user must access the generic link for subsequent logins.



Portal Timeout

- Automated time-out function if the application is idle with no activity for 30 minutes.
 - Ensures HIPAA compliance
 - · User prompted of the potential time-out.
 - · Pop-ups must be enabled through the browser settings
 - Prompt will clear automatically from the screen after 5 to 10 seconds.

IMPORTANT: There is no message to indicate when the application times out. The user will experience the system not operating as expected. Refreshing the browser will cause the login screen to popup.



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Deactivation / Reactivation Process

Deactivation of user access occurs when:

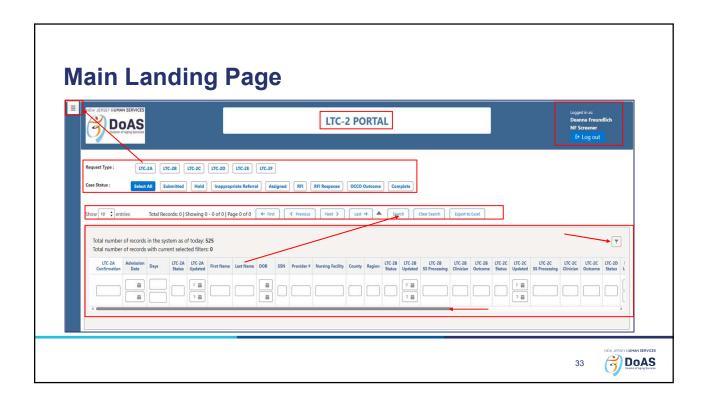
- 1. User who never initialized portal access after 30 days.
 - Remember, initial access link only valid for 24 hours. If action not taken, outreach to NF Portal Support is required to request a new initial access link.
- 2. Users who remain inactive for 120 days.
- Email notification sent to user prior to deactivation.
 - At a minimum, user must log into the portal once to avoid deactivation.
- Reactivation requires submission of the SF-2, Portal User Access Request Form, sent to NF Portal Support.
 - Must identify "Reactivation" on SF-2 form.

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Main Landing Page – NF Portal Features Case Status Searches Page Functionality



Main Landing Page

- 1. Portal Identification: Identifies the Nursing Facility Portal.
- **2.** Logged in as [User Name] / Logout: Identifies the name of the logged in user, with a "Logout" action button, which is utilized to close the application.
- 3. Quick links): Once clicked, allows user to select "Create New LTC-2A", as well as access available resources as provided by DoAS.
- **4. App Type**: NF Portal users are brought directly to NF Portal Landing Page. OCCO users must utilize the drop-down to select the LTC-2 application type.
- **5.** Page functionality: # of records displayed, page #, prior, next, last.
- 6. Search / Clear Search: Utilized for any column header search.
- 7. Export to Excel: Based on search criteria, ability to export.

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Main Landing Page

- **8. Grid Columns:** Identifies select LTC-2 record detail, including resident demographics, LTC-2 request types where current status and applicable outcomes are identified, amongst other detail. Utilized for locating portal records. User has ability to hide columns not relevant by clicking and then uncheck columns not desired.
 - User may search for records by column headers (1 or more) or combo of Request Type and Case Status
 - · Any columns may be sorted in ascending or descending order.
 - · Columns with two input boxes may include a "To" and "From"
 - E.g., Days, Submission Dates, etc.
- **9. Request Type:** Selection of one or more case status tabs along with one or more LTC-2 Request Type produces a grid listing of records.
 - · Request types covered later in this training.
- **10.Case Status:** Represents the current workflow of LTC2 portal records. Selection of one or more case status tabs along with one or more LTC-2 Request Type produces a grid listing of records.
 - · Case Status and Workflows covered later in training.

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Column Visibility

Admission Date

Days

☑ LTC-2A Confirmation

LTC-2 Portal - Case Status

Case Status Request Types Definition

Case Status	Request Types	Definition	Portal User
New	All	Initiates NEW LTC-2A request type.	NF user
Incomplete	LTC-2E only	Applies on to LTC-2E, NF Clinical Screen. User may initiate and later return to complete for submission within 5 business days.	NF user
Submitted	All	Identifies a fully completed LTC-2 request, ready for OCCO processing.	NF user
Hold	All	Received by OCCO, but requires additional research	OCCO SS
Inappropriate Referral	LTC-2B, LTC-2E	Any referral type that will not be processed by OCCO. This status remains. Referral closed.	OCCO SS
Assigned	LTC-2B only	When assigned for onsite assessment.	OCCO SS
RFI	LTC-2B, LTC-2E	Any referral for which clarification is required.	OCCO SS
RFI Response	LTC-2B, LTC-2E	Any RFI responded to by NF user for continued processing.	NF user
OCCO Outcome	LTC-2B, LTC-2E	Any request where an OCCO Outcome has been documented.	OCCO SS
Completed	All	Final processing completed by OCCO.	OCCO SS

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Main Landing Page - Grid Columns

(from left to right) NOTE: Users may hide unnecessary columns

LTC-2A Confirmation	Admission Date	Days	LTC-2A Status
LTC-2A Updated	Last Name	First Name	DOB
SSN	Provider #	Provider Name	County
Region	LTC-2B Status	LTC-2B Updated	LTC-2B SS Processing
LTC-2B Clinician	LTC-2B Outcome	LTC-2C Status	LTC-2C Updated
LTC-2C SS Processing	LTC-2C Clinician	LTC-2C Outcome	LTC-2D Status
LTC-2D Updated	LTC-2D SS Processing	LTC-2D Clinician	LTC-2D Outcome
LTC-2E Status	LTC-2E Updated	LTC-2E SS Processing	LTC-2E Clinician
LTC-2E Determination	LTC-2F Status	LTC-2F Updated	LTC-2F SS Processing

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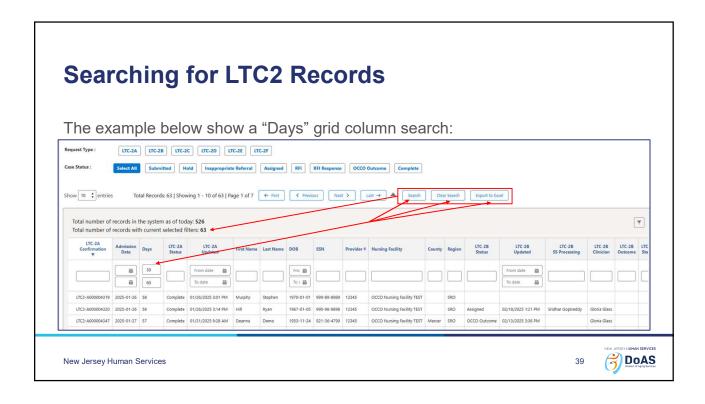


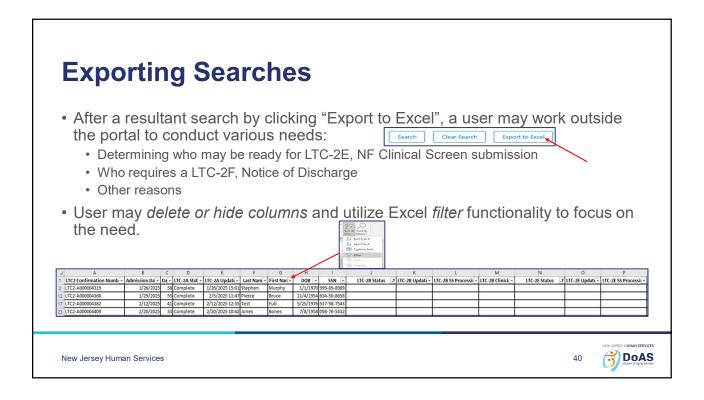
Searching for LTC2 Records

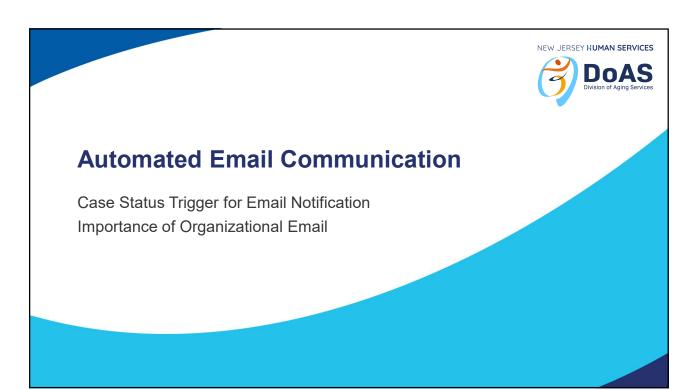
- For HIPAA compliance, no records are visible upon entry or following a browser refresh. NOTE: While OCCO will have full access to all records, the NF user will only have access to records linked to their registered facility/provider type.
- The portal provides several ways to access records:
 - Clicking "LTC-2A" and "Select All" Case Status will display all NF portal records for provider.
 - · Using a combination of "Case Status" and "Request Types".
 - · Using a single or multiple grid column criteria.
 - Any combination of "Case Status", "Request Type", and/or grid column criteria.

IMPORTANT: To initiate any new search the user must conduct a "browser refresh" or select "Clear All" to clear the previously selected criteria and to ensure any new information populates to grid. If this is not done, the search will not be accurate.







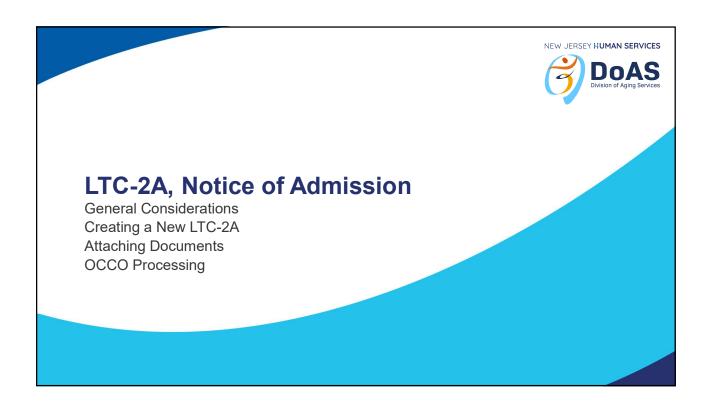


Portal Generated Email Communication to NF

The following case status updates will trigger an email to both, the NF user and organizational email:

- 1. Inappropriate Referral
- 2. RFI (Request for Information)
- 3. OCCO Outcome/Determination
- 4. CP-2 Referrals from CSSA (onsite OCCO assessment expected)
- Due to HIPAA compliance the full detail is not included in email, requiring the user to access the portal for specifics.
- The organizational email provided during registration via the SF-1, ISR form is critical to ensure communication to the NF for any instance a user is unavailable.

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LTC-2A, Criteria

- 1. The LTC-2A is required for all NF admissions regardless of payer source and must be submitted via the NF Portal to the Office of Community Choice Options (OCCO) within 2 business days of the NF resident's admission.
- 2. Only one LTC-2A submission is permitted for each resident admission.
 - a. For residents who required hospitalization and *return to the same NF within 10 days*, a new LTC-2A submission is not required.
 - **b. Exception:** A break in service requires a new LTC-2A to be submitted to OCCO if resident discharged to the Community, Assisted Living, or Psychiatric Hospital and re-admitted to the same NF.
- 3. If the PASRR Level I is <u>positive</u>, a copy of both the positive PASRR Level I and the appropriate PASRR Level II Authority Determination(s) must be attached as a {.pdf} file type.
 - a. If the resident was admitted as a 30-Day Exempted Hospital Discharge with or without a valid EARC and the LTC-2A, Notice of Admission submission date is greater than 40 days, a copy of both the positive PASRR Level I and the PASRR Level II Authority Determination(s) must be attached as a {.pdf} file type

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LTC-2A General Considerations

The LTC-2A establishes the NF record for the resident's current admission, which would enable additional LTC2 request types as applicable.

- No LTC2 request type can be submitted for a resident unless the LTC-2A, Notice of Admission is submitted as required to create the portal record.
- When linked to an EARC, field data will auto-populate to the LTC-2A.
- Each section of the LTC-2A must be completed in its entirety prior to moving to the next section (page). Various detail auto-populates from provider profile or linked EARC.
- Action buttons at the bottom of each section of the data entry screen:
 - · "Previous" returns the user to the prior page.
 - "Save and Next" checks for errors/missing detail and advances the user to the next page if no errors are present.
 - "Cancel" clears the detail and closes the record. If the LTC2 request is still required, the user must initiate a new LTC2.

Previous

Save and Next

Cancel

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LTC-2 Workflow

STATUS	DESCRIPTION	ACTIVITY INITIATED BY	NOTIFICATION	NOTES
NEW LTC-2A Notice of Admission	LTC-2A must be submitted within 2 business days of resident admission, regardless of payer source.	NF, SCNF or Billing Agent users	N/A	 LTC-2A initiates resident record for a specific NF admission. LTC-2A must be submitted before any other LTC-2 request type can be created. If resident admitted with a valid EARC, both are linked. Document attachments (i.e., Positive PASRR Level I and Level II Determination) must be PDF format. If PASRR Negative, no document required
(LTC-2A) Submitted	A fully completed LTC- 2A submitted to OCCO. When linked to EARC only.	NF, SCNF or Billing Agent users	N/A	 LTC-2A received, pending OCCO processing. OCCO SS input provider # in eligibility system when EARC linked to LTC-2A. NF may create & submit other LTC-2 request types through LTC2 record when applicable.

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Creating A New LTC-2A – EARC Search

- To initiate a new LTC-2A, the NF user must click the button, which is located on the left upper corner of the landing page.
 - The "Quick Links" navigation pane will open; The user must click "New LTC-2A".
- Once clicked, the "EARC Search" page will open. Regardless if there is a known EARC (Enhanced At-Risk Criteria) or not, the NF user is required to input the "Date of Admission" of the new resident and "SSN" (Social Security Number) to ensure linkage to a valid EARC if present.
- Once claimed and LTC-2A submitted, the EARC is no longer available in the search. If the user realizes this scenario at the point of creation of the LTC-2A, simply cancel the LTC-2A to release the EARC.



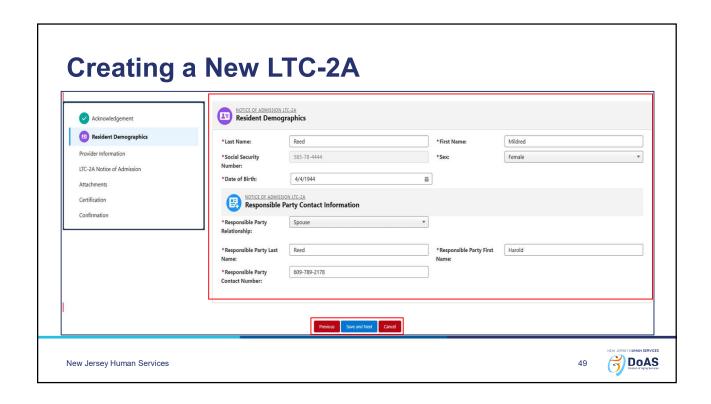
Creating a New LTC-2A

- The NEW LTC-2A begins with an Acknowledgement statement; Click check box, then click "Save and Next" to advance to next section.
- The NF user must complete each section of the LTC-2A.
 - Resident Demographics, Provider Information (auto-populates from NF profile), LTC2A Notice of Admission, Attachments, Certification.
 - **NOTE**: If the LTC-2A is linked to an authorized EARC, various demographic and other detail will auto-populate into the applicable fields.
- Complete all sections of the LTC-2A with required inputs, continuing to the "Attachments" section to attach any **POSITIVE** PASRR Level I and the Level II Determination. If resident was admitted as a 30-Day Exempted Hospital Discharge, the Level II is not required unless a at this time.
 - Based on inputted PASRR detail, attachments listing will display required PASRR documents
 e.g., Level 1 PASRR, Level II MI, or Level II ID/DD/RC. NOTE: "Other" not required, but available.

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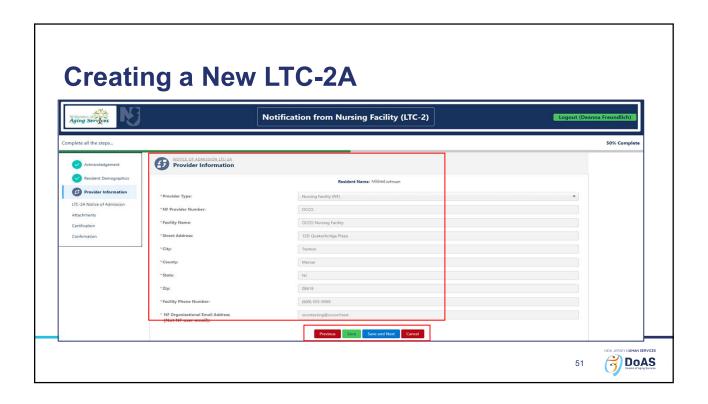


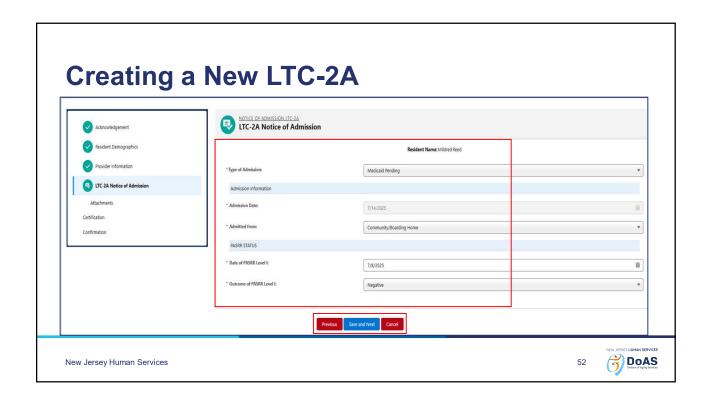
Existing LTC2 Record Message Prompt

- Following input of resident demographics, the system will check for an existing, active LTC2 record.
- If present, user will be prompted with a dialogue box to inform of an existing LTC2 record. NF will be unable to submit a new LTC-2A until prior active record is closed.
 - Click "OK" to clear the message, followed by clicking "Cancel" to return to the Create NEW LTC-2A screen.
- If the LTC-2A is being created for a NEW resident admission, the NF must outreach OCCO to request the active NF record LTC-2F, Notice of Discharge.
 - OCCO will contact discharging NF to request submission of the LTC-2F.
 - If no response after two business days, OCCO will create the LTC-2F and notify receiving NF to then proceed with submission of the LTC-2A.



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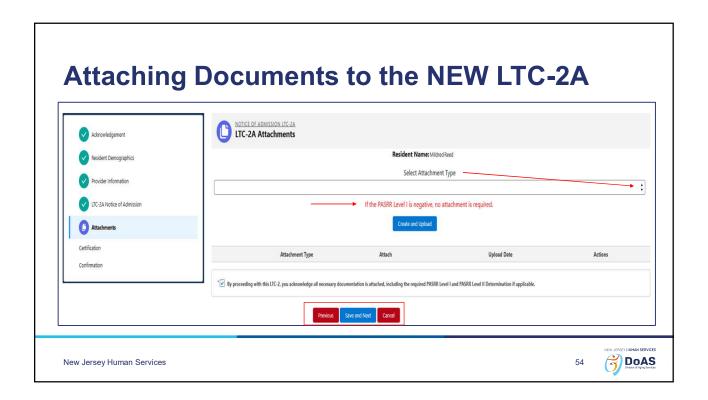


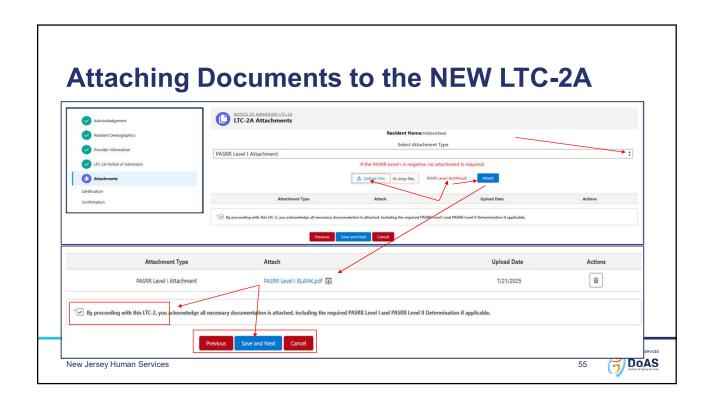
Attaching Documents to the NEW LTC-2A

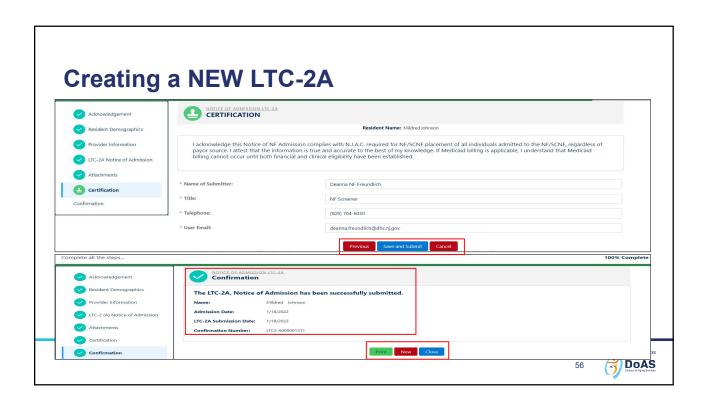
Important - Any document attached in the portal must be in a ".pdf" format. Requiring ".pdf" file types ensure no changes can be made to attachments once submitted.

- 1. Click "Select Document Type" to identify the attachment type to be uploaded.
 - Document Types: PASRR Level I, PASRR Level II MI, PASRR Level II ID/DD/RC, Other
- 2. Click "Choose Attachment" and browse computer for the applicable file. Once the document is identified click "Attach".
- 3. An attachments grid listing will be visible and display all attached documents. Verify the appropriate document was attached.
 - If necessary, delete a document by clicking the trash can icon in the grid.
- 4. Click into the box prior to the attachments statement, followed by clicking "Save and Next".
- 5. The user is then brought to the Certification section.
 - All user detail will auto-populate from the user profile. If necessary, update any detail as
 applicable, also informing DoAS of the necessary changes to ensure the profile is correct for
 future use.
- 6. Click "Save and Submit" for transmission to OCCO through the portal.









NEW LTC-2A Submission

- Important It is critical that all detail is reviewed for accuracy and corrections made if necessary, prior to submission.
- From the confirmation screen the NF user may choose to:
 - "Print" the detail submitted as a ".pdf" form. NOTE: A .pdf copy of the submission detail is always available in the "Attachments" tab of the LTC2 record.
 - Create a "New" LTC-2A; allowing the user to create a new record for another resident.
 - "Close" the confirmation and return to the main landing page. If the user is looking for the newly created record at this point, a browser refresh is required, followed by a search.
- Once submitted, the resident's record is now in the portal. Any new LTC2 requests specific to this resident must be created within this record, which is now accessible following a search from the main landing page.
 - Browser refresh required to locate new record in main landing grid.





LTC-2A Workflow - OCCO Processing Steps

• Upon submission, the LTC-2A case status will update as follows, dependent on whether linked to an FARC or not:

SUBMISSION STATUS	SCENARIO and OCCO PROCESSING STEPS
Submitted	 If linked to EARC, requires OCCO input of Medicaid provider # in NJ MMIS. Following processing, OCCO updates status to "Completed".
Complete	 If not linked to EARC the case status auto-updates to "Completed", no OCCO processing required.







LTC2 Record

The LTC2 serves as the resident's record for an entire NF admission, which begins with submission of the LTC-2A and becomes inactive with submission of the LTC-2F, Notice of Discharge. An individual may have multiple LTC2 records to represent each new facility admission, but only one active record is permissible.

- Individual Record tabs: Each LTC2 request type is a separate section of the record. The user must click into the respective LTC2 tab for creation of any new requests, to review submission detail, check current status updates and related detail, and to view OCCO Outcomes.
 - LTC-2A, Notice of Admission: Default tab opened upon access to LTC2 record.
 - LTC-2B, Request OCCO Clinical Assessment
 - LTC-2C, Notice of MCO/PACE Disenrollment (Not active, Phase III)
 - LTC-2D, Section Q Referral (Not active, Phase III)
 - LTC-2E, NF Clinical Screen
 - · LTC-2F, Notice of Discharge
 - · Attachments: Provides a listing documents attached to record, including PASRR documents when applicable

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LTC2 Record (continued)

- LTC2 Record Heading: This detail provides the basic information related to the resident admission, including:
 - Confirmation Number, Resident (name), Nursing Facility, Date of Admission and Discharge Date (when applicable)



 Reload button: This action button allows the user to refresh the LTC2 record without returning to the main landing page/grid and having to search again for the record.



LTC2 Record (continued)

- LTC-2 Full Submission History: Identifies all LTC2 requests submitted for the resident's current admission. No user functionality is available through this listing; the user must click into the respective LTC2 request type tab and sub-tabs for review of status updates and related detail, and OCCO outcomes.
 - Confirmation Number: System generated on submission for all request types.
 - Submit Date: System generated date of original LTC2 request type submission
 - · Submission Type: LTC2 request type
 - · Status: Current LTC2 status
 - Status Updated: System generated date and time of the last status update.
 - OCCO Outcome: Displays actual outcome/administrative action.
 - · OCCO Date: Date of the OCCO outcome.
 - Attachments: Indicates whether attachments were submitted with the request type
 ("Yes" or "No")

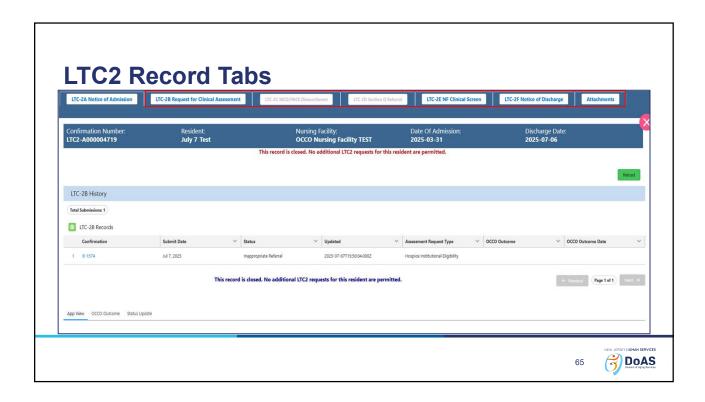
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LTC2 Record (continued)

- LTC-2A Submission Detail: NF user inputted LTC-2A admission detail.
- LTC-2A Status History: History of all status updates specific to the LTC-2A.
 - · If linked to an EARC the case status will be coded 'Submitted'
 - · Requires OCCO processing to input provider # into eligibility system for Medicaid billing.
 - If not linked to EARC the case status will be auto-updated to 'Complete'.
 - · No OCCO processing required.
- LTC-2A Demographics History
 - Provides a listing of all changes to demographics, including Field, New Value, Old Value, Updated By, and Updated Date
 - NF user unable to directly update demographics but has opportunity to alert OCCO when submitting new LTC2 request types during the verification process.
 - Otherwise, if demographic updates required outreach to OCCO is necessary.





Other LTC2 Record Tabs

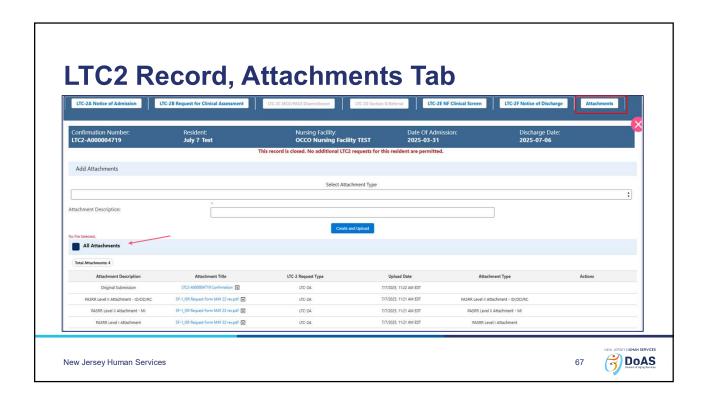
Each LTC2 record tab includes information specific to that request type, including:

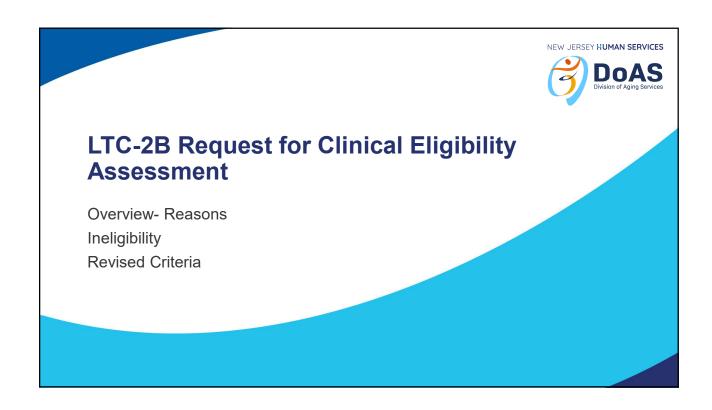
- LTC2 Record Header: Visible regardless of the LTC2 record tab selected.
- LTC-2[type] History: Chronological history of all submissions for the LTC-2 request type.
 - IMPORTANT: User must click and select the confirmation number from the history list of the applicable request to view original submission detail, or by clicking the "OCCO Outcome" or "Status Update" sub-tabs to view related OCCO processing detail.



- Request New LTC-2[type]: If no open request type waiting final processing, when applicable record tab is open, the input fields are visible without need to click action button.
- OCCO Outcome tab: Click to view the full detail of the final OCCO Outcome/Determination.
- Status Update tab: Click to open Status update history from the point of submission.







LTC-2B, Request for Clinical Assessment **OVERVIEW**

Submission of the LTC-2B, Request for Clinical Assessment is utilized by any user to request an on-site OCCO clinical assessment only when the LTC-2E is not indicated. Formerly referred to as a Request for PAS.

LTC-2B Request Types:

- □ Out of State Admission with OCCO Authorization
- □SCNF Admission without prior clinical eligibility
- □ Change in Level of Care (NF to SCNF, SCNF to NF, or SCNF to SCNF)
- ☐ Hospice eligibility or Hospice Revoked
- □MCO or PACE Disenrollment (Temporary until LTC-2C available in Phase III)
- □CSSA (formerly CWA) CP-2 Referral Received, Scheduled for OCCO Onsite Assessment
 - Utilized by OCCO only. Not visible to NF user when creating NEW LTC-2B.





LTC-2B, Request for Clinical Assessment: **CRITERIA**

- An LTC-2A, Notice of Admission has been submitted prior to the LTC-2B, Request OCCO Clinical Assessment submission; and
- The resident requires clinical eligibility for Medicaid FFS billing: or
 - May also be requested as a change in prior level of care determination (i.e. NF to SCNF placement) or a prior level of care determination has expired.
 - NOTE: Clinical eligibility by OCCO (PAS) is valid for up to one year. If clinical eligibility was previously established, a new LTC-2B submission is only permissible if the prior clinical eligibility assessment (PAS) is expiring within 45 days and is not eligible for the LTC-2E, NFCS.
- The resident appears to be Medicaid eligible or will become eligible within 180 days of admission and there is no MCO enrollment at the time of the request.

Important: The LTC-2B is not permitted for involuntary transfer requests. The NF must submit a "Notice of Intent to Discharge" letter to DoAS and follow current standard operating procedures (SOP).



LTC-2B Request for Clinical Assessment INELIGIBILITY

Residents who may be Medicaid eligible within 180 days

- Resident's within this category will now be required to have the LTC-2E, Nursing Facility Clinical Screen completed/submitted from day 30 to 60 of NF admission.
- The LTC-2E, Nursing Facility Clinical Screen will serve as a 180-day authorization for NF placement from date of admission, which is contingent upon full clinical and financial Medicaid eligibility within a 180-day timeframe as per NJ.A.C. 10:166-1.8(b.1).
 - If submitted after day 60, the 180-day authorization will begin from the date of the LTC-2E submission.

NOTE: This ineligibility is a significant change from what is occurring today.



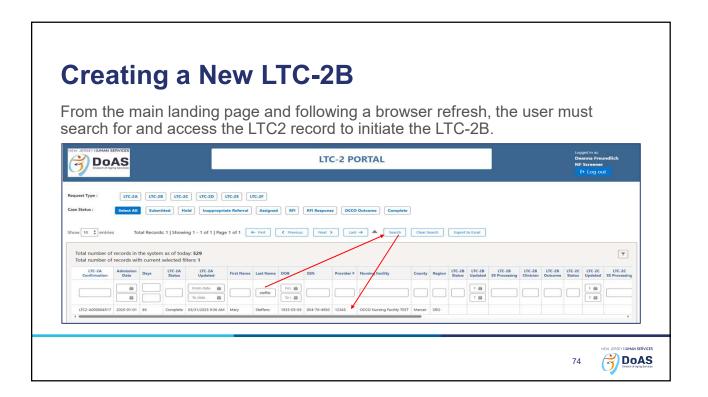


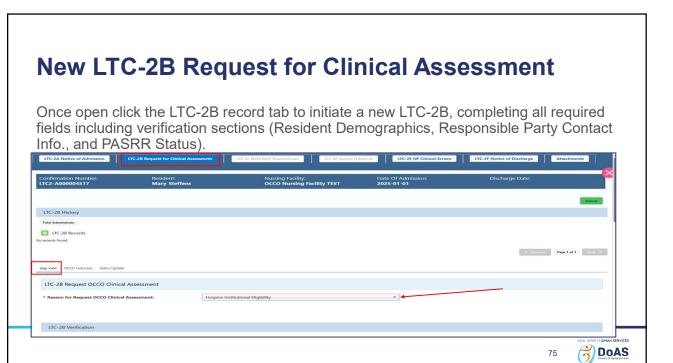


LTC-2B Request for Clinical Assessment WORKFLOW

Creating a New LTC-2B Workflow Process

LTC-2B ACTIVITY / STATUS	LTC-2B is required when a resident needs an OCCO clinical assessment and meets the specified criteria. IMPORTANT: If the criteria for an LTC-2E NF Clinical Screen is met, an LTC-2B is not required. (N/A to SCNFs) If valid PAS expiring and no Medicaid, the LTC-2E, NF Clinical Screen is indicated. Only one active LTC-2B or LTC-2E request may exist at a time. A fully completed LTC-2B submitted to OCCO.	ACTIVITY INITIATED BY NF, SCNF, or Billing Agent user or OCCO Support Staff (SS) — CSSA CP-2 Referrals only	N/A N/A	NOTES	
New (LTC-2B) Request for Clinical Assessment				 N/A for MCO/PACE active enrollees. N/A if admitted as Private Pay or Medicaid Pending, with or without a valid EARC, unless change in condition or other required criteria. Validation sections must be addressed and changes made if applicable. If demographic corrections are required, user must specify changes for OCCO update. OCCO creation of the LTC-2B is only indicated upon receipt of a new CP-2 Referral when an existing LTC2 record is identified. If no LTC2 record, no new LTC-2B created. 	
(LTC-2B) Submitted				 NF generated LTC-2B received, pending OCCO processing; or OCCO generated following CP-2. 	



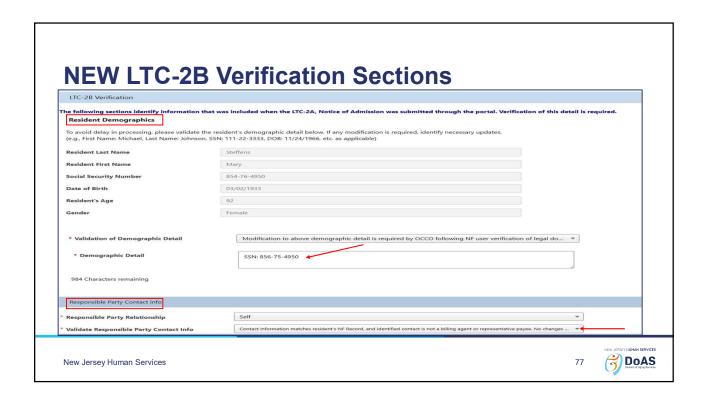


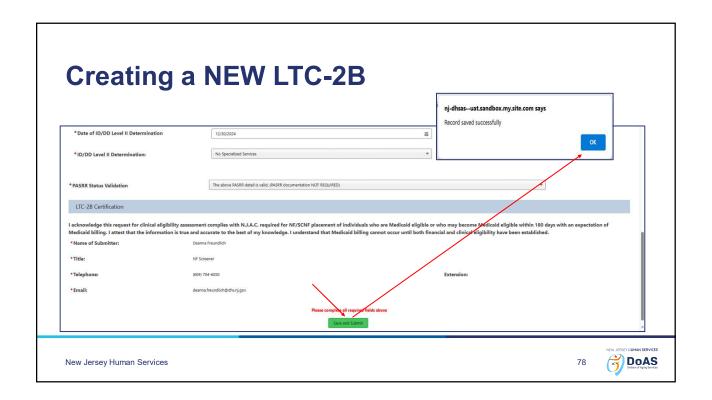
NEW LTC-2B Verification Sections

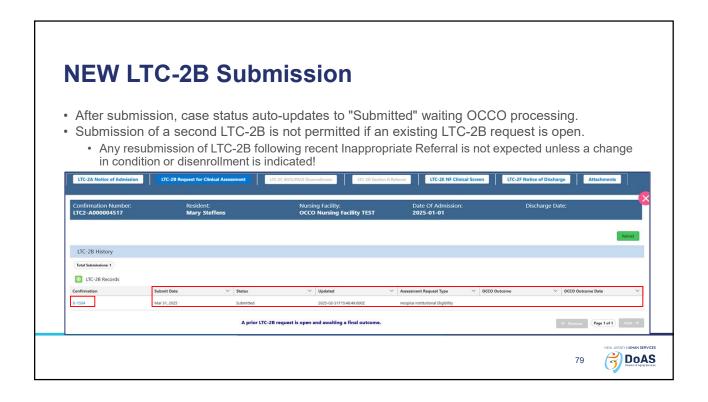
The following sections auto-populate information that was included when the LTC-2A, Notice of Admission was submitted through the portal. Verification of this detail is critical to allow for prompt processing. User must identify if detail matches NF record or if changes made where applicable.

- Resident Demographics
 - No direct demographic modification can occur; Detail requiring modification must be identified by NF user for OCCO to then update LTC-2A record demographics upon receipt.
 - Intended to limit Inappropriate Referral updates related to incorrect demographics.
- Responsible Party Contact Information
 - NF user can modify detail directly within each Responsible Party item, which updates the LTC-2A record detail.
- PASRR Status
 - NF user can modify detail directly within each PASRR item, which updates the LTC-2A record detail.
 - If PASRR detail updated from negative to positive, the required documents must be attached to record prior to submission of the LTC-2B. (PASRR Level I and Level II Determination)







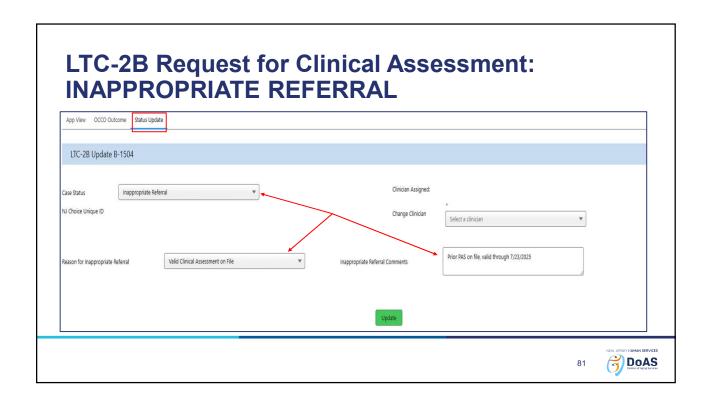


LTC-2B Request for Clinical Assessment: INITIAL OCCO PROCESSING

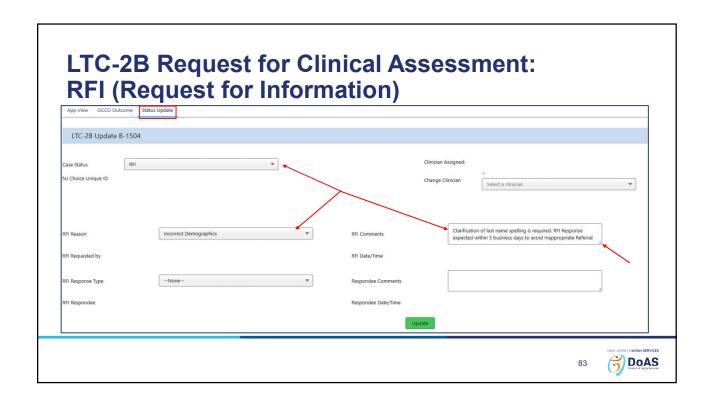
LTC-2B ACTIVITY / STATUS	DESCRIPTION	ACTIVITY INITIATED BY	ELECTRONIC NOTIFICATION	NOTES
(LTC-2B) Inappropriate Referral	LTC-2B will closed without processing if any of the following apply: Eligible for NF Clinical Screen Valid Clinical Assessment on File MCO Enrolled PACE Enrolled Other (specify)	occo ss	Activity email to NF user	 If Medicaid MCO/PACE enrolled, immediate response following submission to close referral. LTC-2B request is closed as no further action is required by OCCO or the NF user. Specifics related to rejected referral will be provided in comments.
(LTC-2B) Hold	LTC-2B received by OCCO, but requires additional processing.	OCCO Support Staff (SS)	N/A	 OCCO research or action required prior to proceeding with LTC-2B processing.

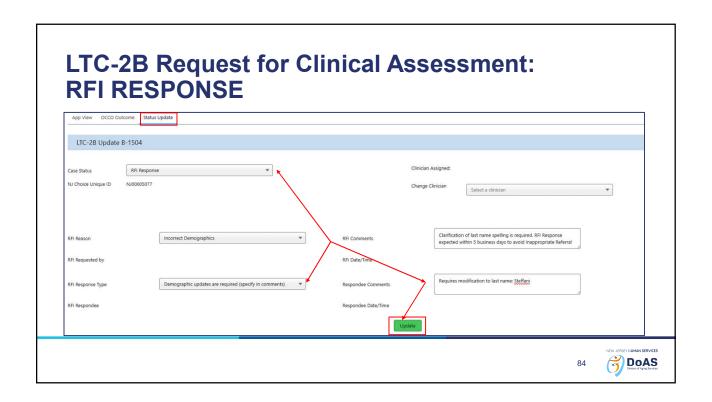
DOAS

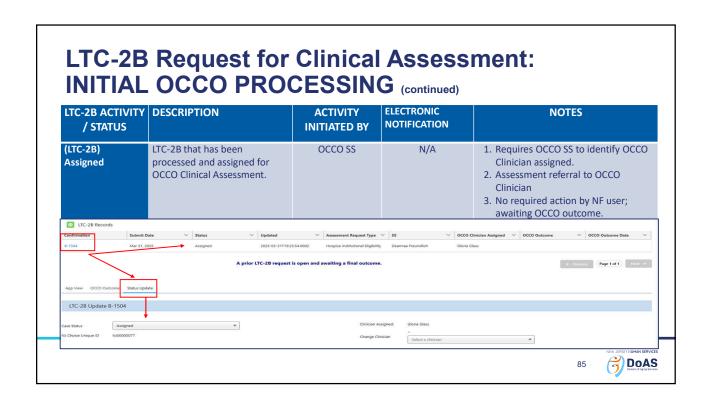
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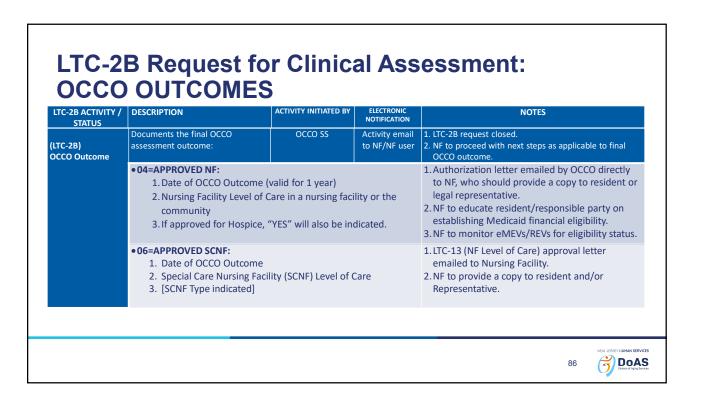


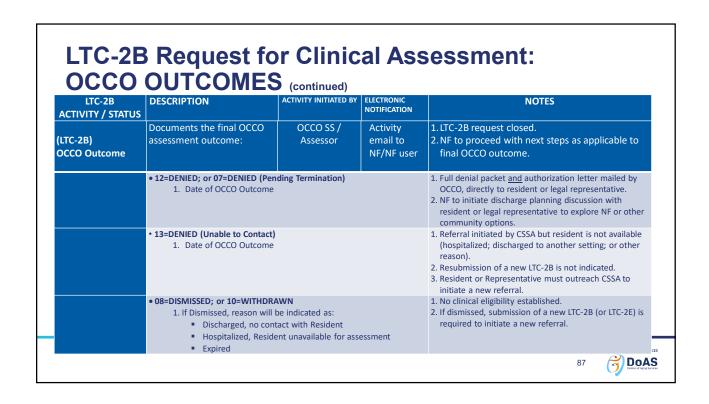
LTC-2B Request for Clinical Assessment: **INITIAL OCCO PROCESSING** LTC-2B ACTIVITY DESCRIPTION NOTES INITIATED NOTIFICATION / STATUS (LTC-2B) Submitted LTC-2B where an issue is OCCO Activity email 1. Specifics related to request will be provided in identified, which may include: SS to NF/NF user LTC-2 record, LTC-2B Case Update tab, RFI • PASRR documentation (Request for • Incorrect demographics 2. NF user must respond to RFI within 5 business Information) • Other (specify) days to avoid dismissal of the LTC-2B. An RFI response is required to resolve the issue so processing can continue. (LTC-2B) Alerts OCCO SS that response is provided. 1. If all issues resolved, OCCO to proceed with **RFI Response** RFI Response Type: assignment for onsite assessment. 2. IMPORTANT: The referral date is updated to date Demographics validated as correct; of RFI Response. no changes required Demographic updates are required (corrected demographics to be identified in RFI Response comments area) Other (reason) with specified comments. DoAS

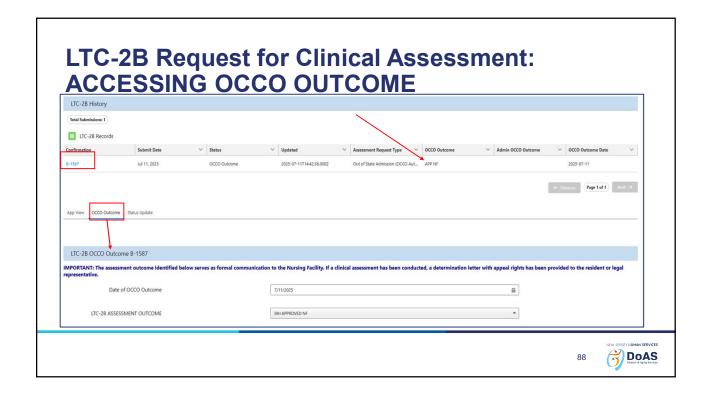


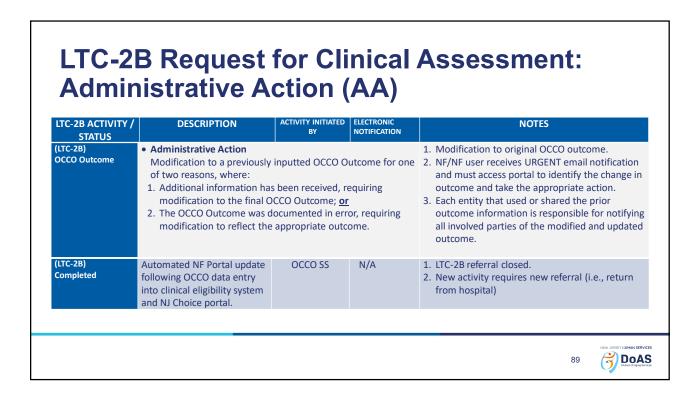


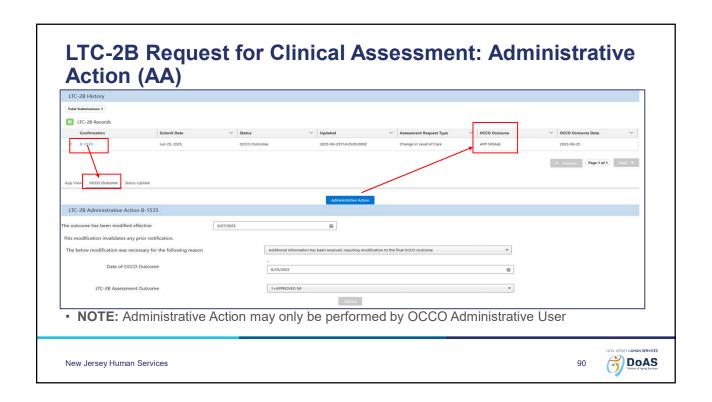


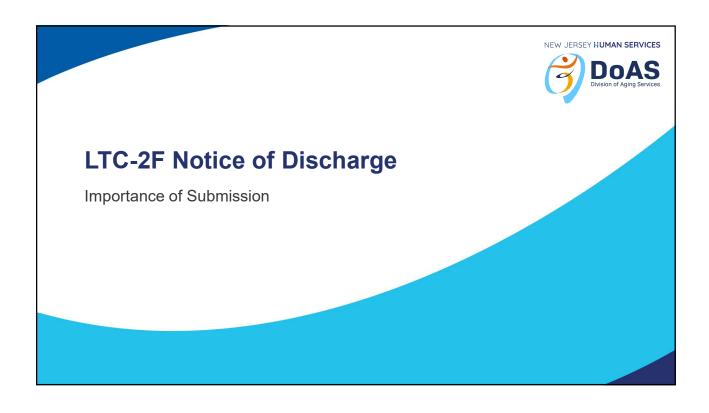












LTC-2F Notice of Discharge

Submission of the LTC-2F is critical for all Nursing Facilities.

- Only one active record is permitted within the portal for each individual
- Delay in submission impacts an admitting NF to complete their LTC-2A, Notice of Admission, which
 may also impact billing processes.
- · Non-compliance with this process adds complexities at multiple levels.
- · Access "Active NF Admissions" report in Quick Links periodically.

Identify "Discharge Location or Death"

 Utilize "Other" when closing out record errors, with date of discharge indicated as admission date and location address as current facility. Include comment in "Discharge Location Other" to indicate scenario.

Admitting NF process if existing record indicated (also covered in LTC-2A section of PPT).

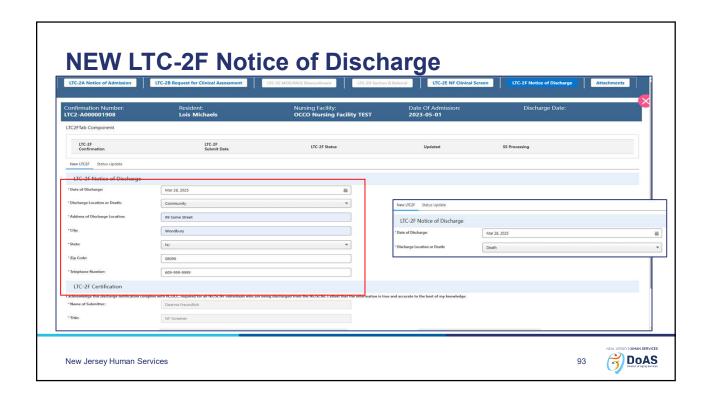
- Outreach respective OCCO (NRO/SRO).
- OCCO will outreach discharging NF to request submission of the LTC-2F
 - · Once discharging NF informs of action, OCCO will alert admitting NF.

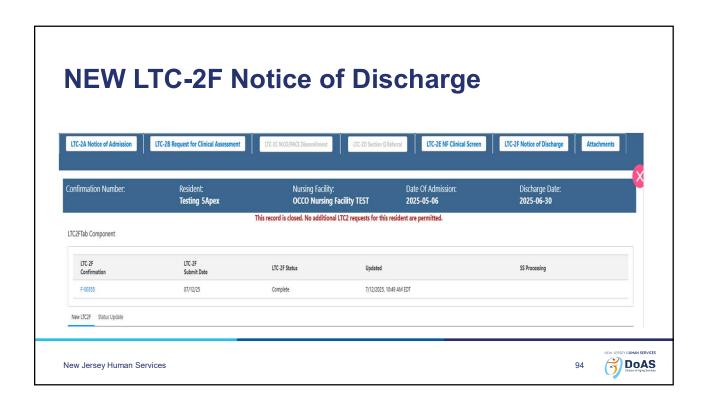
The LTC-2F closes the portal record. No new requests can be submitted.

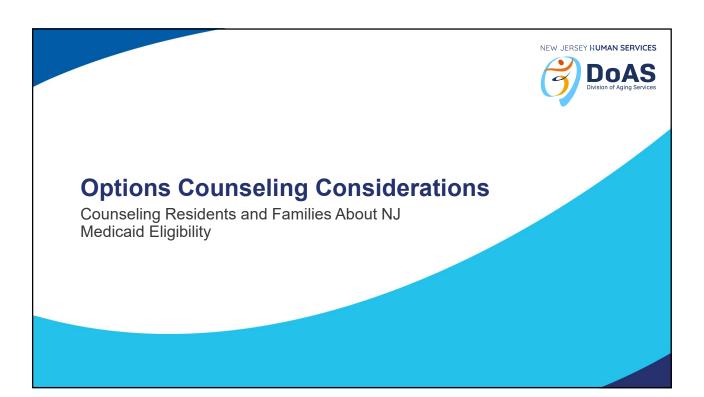
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DOAS

Division of Aging Services







Importance of Options Counseling

- Options Counseling is vital to ensure the resident and/or representative is aware of the importance of obtaining both Medicaid financial and clinical eligibility when applicable, and initiating the Medicaid financial application timely to avoid billing issues.
- If financial application is not initiated and finalized, any valid clinical assessment is not relevant to assist in providing coverage for a residents NF stay.
- Expectation is that the resident and/or representative is aware of and consents to the submission of any LTC-2 requests to OCCO in the portal.
 - If Medicaid application is not expected, no LTC-2 requests should be made to OCCO.

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Options Counseling-Resource Documents

- DMAHS 2025 Income Standards (updated yearly)
 - For informational purposes only. Program specific eligibility standards can be verbally shared with resident and/or representative.
- DoAS Programs Side By Side (updated yearly)
 - For informational purposes only. Provides a listing of DoAS specific programs, including MLTSS and State specific programs.
- NJ FamilyCare Aged, Blind, Disabled Programs 2025
 - https://www.nj.gov/humanservices/dmahs/clients/medicaid/abd/NJFC-ABD-BRO-E-2025.pdf
 - Provide to residents and/or representative so they can begin to understand what is required when applying for Medicaid.
- Recoveries from Estates of Deceased/Former Medicaid Beneficiaries
 - If questions about estate recovery arise, provide to resident and/or representative and direct them back to the CSSA for in-depth discussion. Ultimately, the CSSA should provide counseling on this potential during the application process.

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General Reminders for Phase II Implementation

Any NF without active users must register direct NF staff prior to GO LIVE to enable immediate access to LTC-2 (NF) Portal and submission of the LTC-2E NFCS.

NFs who utilize Billing Agents must coordinate portal responsibilities prior to GO LIVE.

• Who is responsible for creating LTC-2 record and submission of the LTC-2B Request for Clinical Assessment and LTC-2E Notice of Discharge?

It is the user's responsibility to access available resources for portal navigation and understanding of required criteria and processes.

- · Refer to Training PPT (Recording), NF Portal Process and Workflow documents for any questions prior to reaching out for assistance.
- Understand the password reset process to avoid need for assistance.

REMEMBER: The overall goal of the LTC-2 (NF) Portal is to streamline processes.

- · Submissions of Inappropriate Referrals impacts the ability to address the needs of those residents who do require Medicaid clinical eligibility.
- · OCCO will monitor the NF Portal for any excessive Inappropriate Referrals



	DATE	COMMENTS		
Training: Navigation Considerations for LTC-2 (NF) Portal	7/29/2025	This is a recorded training, made available by this date (emailed to all NF users and NF providers). All navigation considerations will be covered to provide a preliminary understanding of the LTC-2 Portal, prior to the full training and upcoming implementation. This training will also be posted to the DoAS Provider Resources website.		
Training: Phase II Implementation, LTC- 2 (NF) Portal (All NF Users)	8/13/2025	All NF Portal users are required to attend this live, online training; or access the recording prior to Phase II implementation. The training will provide an in-depth portal overview, as well as processing considerations for the LTC-2A, Notice of Admission, LTC-2B, Request for Clinical Assessment; and the LTC-2E, Notice of Discharge. This training will also be posted to the DoAS Provider Resources website. REGISTRATION REQUIRED		
LTC-2B submissions halted.	8/15/2025 (Close of business)	Salesforce will inactivate LTC-2B submission button in preparation for Phase II, including LTC-2E implementation. A policy guidance document will follow regarding our implementation considerations, including the halting of LTC-2B submissions.		
NF Providers input LTC-2Fs Notice of D/C, for residents no longer in facility	8/18 - 22/2025	Run report: "Active NF Admissions" available in NF Portal, Quick Links areas of the portal.		
Training: LTC-2E, Nursing Facility Clinical Screening Process (NF Users involved in this process)	8/20/2025	Only those NF users involved in the completion of the LTC-2E are required to attend this live, online training; or access the recording prior to Phase II implementation. The focus will be exclusive to LTC-2E, NF process considerations. This training will also be posted to the DoAS Provider Resources website. REGISTRATION REQUIRED		
Current LTC2 Portal goes dark	8/22/2025 (Close of business)	All LTC-2 processing will cease; all portal records to be transitioned to new LTC2 portal.		
Final registration of New NF Portal users.	8/22/2025	Submission of the SF-2, Portal User access request form is required. The form must be electronically completed and include required signatures.		
DoAS/Salesforce Testing of Production environment	8/25 – 29/2025	All existing records from Phase II imported to new application. Preliminary testing and final programming of the production environment prior to Go Live.		
Training: Phase II Implementation, LTC- 2 (NF) Portal (OCCO SS Users)	8/26/2025	This training focuses on OCCO SS portal processes covering all aspects of the LTC-2 Portal.		
Go Live	9/2/2025	Phase II implementation active.		
New Portal users receive login detail	9/2/2025	Existing users will access application with current user ID and passwords.		
Ongoing Post-implementation Support	9/2 - onward	Any issues related to any NF user or portal navigation shall be reported to the NF Portal Support team at DoAS_NFPortal.Registration@dhs.nj.gov.		

Deactivation Process

- To free up Salesforce licenses, Salesforce is expected to conduct a deactivation process close of business 8/15/25.
 - If no login over the last 120 days and access still required, a login to the LTC2 portal is necessary prior to this date.
 - Daily deactivation process will follow for those who are not accessing the portal
 - 120 days where no login occurred
 - 30 days where new user never logged in
 - Users deactivated who require continued access must submit the SF-2 to request reactivation.

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Questions?

Following this training, direct all LTC-2 process questions to Deanna Freundlich and Mark Mangum.

EMAIL:

Deanna.Freundlich@dhs.nj.gov; Mark.Mangum@dhs.nj.gov



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