REQUEST TYPES AND PORTAL PROCESSES
DOAS-SALESFORCE PORTAL
PHASE I IMPLEMENTATION
NURSING FACILITY TRAINING
JUNE 24, 2022
(FINAL)

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Overview of the LTC-2 and PASRR

LTC-2, NOTICE OF ADMISSION OR TERMINATION
AND REQUEST FOR PAS;
N.J.A.C. 8:85-1.8(c.)
AND
PASRR FEDERAL LAW TITLE 42:483.100-138
LTC-2 Notification From Long Term Care Facility: Prior to Portal Implementation

The Notification from Long Term Care Facility (LTC2) is the tool used by NJ Medicaid Certified Nursing Facilities to communicate to the Office of Community Choice Options (OCCO) Regional Office

1. Admissions
2. Terminations
3. Request for PAS
4. PASRR status notification

Prior to portal implementation all LTC2 submissions were conducted as a ‘paper’ process requiring email submissions to OCCO.

The LTC2 is now referred to as ‘Notification from Nursing Facility, LTC2’

NJ Nursing Facility Regulations

- N.J.A.C. 8:85-1.8(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. 8:85-1.8(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.
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 individuals with serious mental illness (MI), intellectual disability, developmental disability (ID/DD) or a related condition (RC) 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 payment reimbursement.

NJ’s PASRR Program

- The Centers for Medicare & Medicaid Services (CMS) requires each state and territory to specify the PASRR program in their Medicaid State Plan.
- NJ’s PASRR Program is a collaborative process between the Division of Medical Assistance and Health Services (DMAHS), the Division of Aging Services (DoAS), the Division of Mental Health and Addiction Services (DMHAS), and the Division of Developmental Disabilities (DDD).
  - The Division of Aging Services (DoAS) has the responsibility of overseeing the PASRR Level I process and related reporting to CMS.
  - The Division of Mental Health and Addiction Services has oversight of the PASRR Level II process for individuals identified as having a MI and related reporting to CMS.
  - The Division of Developmental Disabilities has oversight of the PASRR Level II for individuals identified as ID/DD/RC and related reporting to CMS.
Salesforce Portal Overview

Salesforce

- Cloud-based software application
  - Operates within the Government Cloud
  - HIPAA compliant
- Accessible via web-browser
  - Google Chrome or Microsoft Edge are recommended/supported
  - **Internet Explorer is not compatible and should not be used**
  - NOTE: Pop-ups must be allowed to receive timeout warnings and to open various pages
- Real-time processing
  - NF to DoAS OCCO: LTC2; PASRR documents
  - DoAS OCCO to NF: Automated submission; OCCO status and outcomes
  - EARC Status
Salesforce Portal Overview

- Portal access determined by user profile:
  - EARC Screener Portal – EARC processing
  - Nursing Facility Portal – LTC-2 requests
  - OCCO Worker Portal – EARC and LTC-2 processing

- The NF portal provides a ‘hub’ or ‘depository’ for all submitted LTC-2 requests regardless of request type, all contained in one LTC2 record for each resident’s current NF admission.

- The portal allows both the NF and OCCO staff access to all LTC2 requests at any time by conducting a search of the portal.

CRITERIA AND CONSIDERATIONS

LTC2, Notification from Nursing Facility: Request Types
Expansion of LTC2 Request Types

- LTC-2A, Notice of Admission
- LTC-2B, Request for Clinical Assessment
- LTC-2C, Notice of MCO/PACE Disenrollment
  - New, Phase II implementation
- LTC-2D, Section Q Referral
  - New, Phase II implementation
- LTC-2E, NF Clinical Screen (NFCS)
  - New, Phase II implementation
- LTC-2F, Notice of Discharge
  - Previously identified on LTC-2 as Notice of Termination or Notice of Transfer

LTC-2A, Notice of Admission

Submission of the LTC-2A, Notice of Admission by the Nursing Facility (NF) is required for all new nursing facility admissions regardless of payer source or need for Medicaid reimbursement.

- The LTC-2A is required to be submitted through the Nursing Facility Portal within 2 business days of the NF resident’s admission.
  - This submission establishes the resident’s LTC2 record for the current admission.
- Only one LTC-2A submission is permitted for each new resident admission.
  - **Exception:** A break in service requires a new LTC-2A to be submitted to OCCO
    - Break in service i.e. Resident discharged to the Community, Assisted Living, or Psychiatric Hospital and re-admitted to the same NF
  - For residents who require hospitalization and return to the same NF within 10 days, a new LTC-2A submission is not required. If stay exceeds 10 days, notice of discharge required.
LTC-2A – Required PASRR Documentation

- The NF user must submit all Level I (regardless of outcome) and if applicable, Level II Pre-Admission Screening and Resident Review (PASRR) documentation at the time of the LTC-2A, Notice of Admission submission.
  - If the PASRR Level I is positive, a copy of the appropriate PASRR Level II Authority Determination(s) must also be attached.
  - 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.
  - Current forms for the PASRR process can be found at the following websites:
    - PASRR Level I (LTC-26) and Notice of Referral for Level II PASRR (LTC-29): [http://www.state.nj.us/humanservices/doas/home/forms.html](http://www.state.nj.us/humanservices/doas/home/forms.html)
    - For ID/DD/RC related PASRR needs outreach to the respective DDD Regional Office is necessary – See LTC-26 for contact numbers.

LTC-2B, Request for Clinical Assessment

Submission of the LTC-2B, Request for Clinical Assessment is utilized to request an on-site OCCO clinical assessment.

- Criteria:
  - An LTC-2A, Notice of Admission has been submitted prior to the LTC-2B; 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. Clinical eligibility by OCCO (PAS) is valid for up to one year.
  - The resident appears to be Medicaid eligible or will become Medicaid 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).

- NOTE: Resident’s admitted with a valid EARC are not eligible for assessment until day 60 of NF admission.
### LTC-2B, Reason for Request Clinical Assessment

<table>
<thead>
<tr>
<th>REASON</th>
<th>INCLUDES</th>
<th>REFERRAL TIMEFRAME</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medicaid eligible within 180 days</td>
<td>• PAS Exempt &gt;20 days;</td>
<td>• 30 calendar days</td>
</tr>
<tr>
<td></td>
<td>• Respite to LTC</td>
<td></td>
</tr>
<tr>
<td>Out of State Admission</td>
<td>• OCCO Authorized only</td>
<td>• 30 calendar days</td>
</tr>
<tr>
<td>Change in Level of Care</td>
<td>• NF to SCNF [type]</td>
<td>• 30 calendar days;</td>
</tr>
<tr>
<td></td>
<td>• SCNF [type] to NF</td>
<td>• Any SCNF placement – 7 calendar days</td>
</tr>
<tr>
<td></td>
<td>• SCNF [type] to a different SCNF [type]</td>
<td></td>
</tr>
<tr>
<td>Hospice Institutional Eligibility</td>
<td>• Newly seeking Medicaid or currently FFS</td>
<td>• 7 calendar days</td>
</tr>
<tr>
<td>Hospice Revoked</td>
<td>• Enrolled in Medicaid FFS with no MCO</td>
<td>• 7 calendar days</td>
</tr>
<tr>
<td>NF Clinical Screen Not Authorized</td>
<td>• Not currently utilized (Phase II)</td>
<td></td>
</tr>
</tbody>
</table>

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### LTC-2F, Notice of Discharge

**Submission of the LTC-2F, Notice of Discharge** is required to notify OCCO of all residents who have been discharged from the facility regardless of reason (voluntary to another setting, involuntary, death).

- **NOTE:** For transfers to acute care hospitals the LTC-2F is not to be submitted unless the NF receives notification from the hospital that the individual has been discharged to another setting or expired, or the bed hold is released (after 10 days).

- **Criteria:**
  - An LTC-2A, Notice of Admission has been submitted prior to the LTC-2F, Notice of Discharge submission.
  - Requires NF user to document ‘DATE OF DISCHARGE’ or ‘DEATH’, ‘DISCHARGE LOCATION’, ‘ADDRESS OF THE DISCHARGE LOCATION’, and ‘TELEPHONE NUMBER’ (when applicable).
Accessing the Portal

- Portal Registration
- User Profiles
- Access Link
- Portal Login
- Password Resets
- Portal Deactivation Process
- Provider Profile Change Requests

Portal Registration

- Information Security Representative (ISR) form - one for each facility
  - The ISR form (SF-1) that establishes the facility credentials for portal setup and ISR for subsequent user request forms. Changes to ISR designation require resubmission of the SF-1.
  - 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.
    - The authorizing senior level employee cannot be a portal user or the ISR designee

- Portal User Access Request - one for each portal user
  - The Portal User Access Request Form (SF-2) must be completed and signed by the individual in need of NF portal access
  - NOTE: 3 unique employee signatures are required on the user access form (no overlap permitted).
    1) User; 2) User’s Supervisor or designee (cannot be an ISR); 3) ISR (cannot be the user or user’s supervisor)
Portal Access & Profiles

- Upon receipt of ISR, each facility will be activated within the portal and users access can be requested. There is no notification at this level.

- Portal access is dependent on user profile.
  - Nursing Facility (NF) Portal
    - User profiles specific to NF, SCNF, Billing Agent Profiles
    - LTC-2 access based on user profile
  - OCCO Worker Portal
    - User profiles specific to OCCO Support Staff, OCCO Reviewer, OCCO Administrative roles

- All users regardless of profile access the portal through a generic link:
  - [https://njdoas-ua.force.com/wp](https://njdoas-ua.force.com/wp)

Portal User Profiles – Privileges

<table>
<thead>
<tr>
<th>PROFILE</th>
<th>LTC-2A</th>
<th>LTC-2B</th>
<th>LTC-2C</th>
<th>LTC-2D</th>
<th>LTC-2E</th>
<th>LTC-2F</th>
</tr>
</thead>
<tbody>
<tr>
<td>NF User</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>SCNF User</td>
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<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>N/A</td>
<td>✓</td>
</tr>
<tr>
<td>NF Billing Agent User</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>View Only</td>
<td>View Only</td>
<td>✓</td>
</tr>
<tr>
<td>OCCO Support Staff</td>
<td>✓</td>
<td>✓</td>
<td>*</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>OCCO Reviewer</td>
<td>View Only</td>
<td>View Only</td>
<td>View Only</td>
<td>View Only</td>
<td>✓</td>
<td>View Only</td>
</tr>
<tr>
<td>OCCO Admin. User</td>
<td>✓</td>
<td>✓</td>
<td>*</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>

**NOTE:** NF users may create new LTC-2 requests only. No ability to update.

* Indicates the OCCO user’s ability to create a new LTC-2 request type when applicable.
User Email Notification – Initial Portal Access

- Within 2 business days of request for user portal access, an email notification is forwarded directly to the new NF user from the Salesforce portal. This email will include a ‘one time use’ link for the user to establish their initial access to the portal. Sample email:

```plaintext
From: noreply@salesforce.com <noreply@salesforce.com> on behalf of Worker Portal <njsave.noreply@dhs.state.nj.us>
Sent: Thursday, July 9, 2020 5:13 AM
To: XXXXXXXXXX
Subject: Welcome to Worker Portal

Hi XXXXX,
Welcome to Worker Portal! To get started, go to https://njdefense.com/v2/_https://njdoas-ua.force.com/wp/login?ct=t26ecGvG41hX3ampJbS2gDzvzg5vA2hZhq3D4y6t+ErjEMACX6pvV0N1JnuarV1eeGzsfEjDLCwzMy9oKmV3oIt6V6hXwvwevqf5whvzzh3j1pmZfJe23ymY7zYd+9g7Li6T13mmyp5kFmpS0K2wsvhp8/Vn9S12vZk2w1ZlJzvWpGJ
User name: XXXXXXXX (specific user email)

Thanks,
NJ DSS
```

- **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, it is requested the user check the ‘JUNK’ mailbox since this is the first email received from Salesforce.

Portal Access – Generic Link

- The registration email and link is only valid for one initial login.
- Following the initial login, users must access the portal through a different ‘Generic’ link. This generic link is utilized by all portal users.

```plaintext
https://njdoas-ua.force.com/wp
```

**NOTE:** Users are encouraged to save the link to their favorites or place an icon on their desktop for later access.
Portal Login

- Utilizing https://njdoas-ua.force.com/wp, the user must input their ‘Username’ and ‘Password’.
  - Click the ‘Remember Me’ box 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 re-attempt to access the application.

Portal Password Resets

- If user is unable to access the application after two failed login attempts, it is **strongly encouraged** for the user to conduct a password reset to avoid a lockout period. The user must click ‘Forgot Your Password?’ at which point the user is brought to a dialogue box.
- Input Username as provided from Salesforce and then click ‘Continue’.

**NOTE:** The user name is typically the user's email address, but those with multiple profiles (e.g., facility with both NF and SCNF), the user name will include a facility identifier.
IMPORTANT: Following the password reset process, a new dialogue box provides a button to ‘Return to Login’, **DO NOT CLICK THIS LINK AND ATTEMPT TO LOGIN.** It will not work and put you in an ‘endless reset loop’. Close the browser page and check email to access the password reset link.

Password Recovery Email

- **This link is only valid for 24 hours**
  - Access link for password reset for **one-time portal access only**; using the generic link for subsequent logins.

  Your password has been reset for Administrative Tool. Go to:

  https://urldefense.com/v3/__https://uat.njave.n32.force.com/wptest/secures/forgotpassword.jsp?r=ODV0ZWRwcmluyyMwMw02MDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDAwMDA
Portal Timeout

- Automated time-out function if the application is idle with no activity for 15 minutes.
  - 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.

Portal Deactivation Process

- When a user remains inactive within the portal, the need for a license and continued portal access is called into question.

**Deactivation Criteria:**
- Initial portal account not activated by the user within three (3) months of initial notification; or
- The user has not accessed the portal over the last four (4) months.

- Deactivation occurs the first Monday of each month.
  - Automated ‘warning’ email forwarded to the user one week prior to deactivation. User must log into the portal prior to the deactivation process to maintain portal access.

- If deactivation has occurred, the facility must submit a new Portal Access Request form (SF-2) requesting reactivation.
Provider Profile Change Requests, SF-3

- This form is utilized when updates to the provider detail are required.
  - Example: Change in ownership resulting in a need for a facility name change, updates to Medicaid Provider #, address/telephone change, etc.
  - Form can be accessed at https://www.state.nj.us/humanservices/doas/resources/
  - Requires completion and submission by ISR.
  - Upon completion, submit the SF-3 to DoAS-NFPortal.Registration@dhs.nj.gov

- Upon accessing the portal, NF shall review provider detail identified within the LTC-2A, Notice of Admission at the point of creation of a new LTC-2A.
  - Submit the SF-3 to request update if necessary. Updates expected within 2 business days of receipt.

- NFs who have a change in ownership will maintain access to all previously created LTC2 records from the prior NF.

Portal Landing Page & Grid Navigation
Portal Landing Page

- **Portal Identification**: Identifies the Nursing Facility Portal.
- **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.
- **(Quick links)**: Once clicked, allows user to select ‘Create New LTC-2A’, as well as available resources as provided by DoAS.
- **App Type**: From the drop-down select the application type; either the LTC-2 or the NF Clinical Screen applications.
  - ‘LTC-2’ application type must be utilized to initiate all LTC-2 requests.
  - ‘NF Clinical Screen’ application type will not be implemented until Phase II.
Portal Landing Page (continued)

- **Case status + Request Type**: The portal operates based on the current status of the LTC2 request type. Selection of applicable 'Case Status' along with the 'Request Type' creates a list of LTC2s that meet the search criteria.

  ![Portal Landing Page](image)

  **Search By**: Allows the user to search the portal based on a single criteria. This is best utilized for searching ‘Last Name’ for a record known to be in the portal.

  - **NOTE**: The ‘Search By’ functionality is limited to a maximum of 2500 current portal records and may not search the entire database for all potential matches. Therefore, the ‘LTC-2 Search’ discussed below may be the better option in the future as record numbers increase.

- **LTC-2 Search**: This criteria allows the user to input a single or multiple criteria, which conducts a search of the entire database, both old and new records.
Portal Landing Page (continued)

- **Show (#) entries:** Allows users to select how many records are displayed in the below grid listing. System defaults to 10 unless changed.
  - Once the page is refreshed, it will return to ‘10’ entries default.
- **Showing 1 to [#] of [#] entries:** Located at the bottom left of the page, identifies the number of records included based on search criteria or filters.
- **Previous [#] Next:** Located to the bottom right of the page by using bottom scroll bar. Allows the user to move to the previous or next page for additional LTC2 records.

Landing Page - Grid Columns and Navigation

**Grid Columns:** Once a LTC-2A, Notice of Admission is submitted, following a browser refresh the record will appear in the grid listing following the NF user selection of ‘Status’ and ‘Request Type’, or conducting a search.

**NOTE:** All columns identified below can be arranged in ascending or descending order by simply clicking the column header.

The following grid columns are displayed:

- **LTC-2A Confirmation:** Unique identifier auto-generated upon submission. Can be used as search criteria to locate a record.
- **Admission Date:** Date of the resident’s admission as entered by NF.
- **Days:** Number of days since admission – continuously generated by the system.
- **LTC-2A Status:** Current status of the LTC-2A.
- **LTC-2A Updated:** Date and time of the last status update.
- **Last Name:** Entered by NF.
- **First Name:** Entered by NF.
- **DOB:** Entered by NF.
Landing Page - Grid Columns and Navigation (continued)

- **LTC-2B Status**: Identifies the current status of the LTC-2B.
- **LTC-2B Updated**: Identifies the date and time of the last LTC-2B status update.
- **LTC-2C Status**: Identifies the current status of the LTC-2C.
- **LTC-2C Updated**: Identifies the date and time of the last LTC-2C status update.
- **LTC-2D Status**: Identifies the current status of the LTC-2D.
- **LTC-2D Updated**: Identifies the date and time of the last LTC-2D status update.
- **LTC-2E Status**: Identifies the current status of the LTC-2E.
- **LTC-2E Updated**: Identifies the date and time of the last LTC-2E status update.
- **LTC-2F Status**: Identifies the current status of the LTC-2F.
- **LTC-2F Updated**: Identifies the date and time of the last LTC-2F status update.

**IMPORTANT**: Utilize the scroll bar at the bottom of the page to access more columns, as well as the 'Logout' and 'Next Page' functionality. Adjust the browser 'zoom' settings to minimize the size of the text to bring more into view.

Accessing Records in the Portal

- **BROWSER REFRESH AND RELOAD**;
- **SEARCHING FOR LTC2 RECORDS**
### Accessing Records in the Portal

- **Browser Refresh** – Data comes in real-time as it’s being submitted. Frequent browser updates are required to see new detail on the main landing page followed by a search.
  - Don’t use browser refresh while working in a client record as all previously selected criteria will be cleared and you’ll be returned to the landing page.

- **Reload Record** - If working within a record following the creation of a new LTC2 request type or the status had been updated and the record was not auto-updated, the user may choose to ‘Reload’ the page. This allows the current record to update returning the user to the LTC-2A tab of that record. This action is different than the browser refresh as the user will remain in the applicable record without having the need to search to return to the desired record. The reload functionality is available within each request type of the LTC2 record.

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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.

- The portal provides several ways to access records:
  - A combination of ‘Case Status’ and ‘Request Types’
  - Single Search Criteria (‘Search By’)
  - Multiple Search Criteria (‘LTC-2 Search’) in combination with ‘Case Status’ and ‘Request Type’.

  **IMPORTANT:** To initiate any new search the user must conduct a ‘browser refresh’ or select ‘Clear All’ to clear the previously selected criteria. If this is not done, the search may not be accurate.
Searching by Case Status and Request Type

- By selecting the relevant ‘Case Status’ and ‘Request Type’ the user can generate a listing of records based on the criteria selected. Users can click more than one ‘Case Status’ and ‘Request Type’ selections.

‘Search By’ - Single Search Criteria

- This search option is ideal to find a particular record that was recently created.
- Select the desired ‘Search By’ criteria and input the detail, then click ‘Search All’.
  o Confirmation Number, Last Name, First Name, SSN (Social Security Number)
- This search method is limited to the last 2500 records created in the portal and may not locate older records.
- If the user is unable to locate the desired record, utilize the ‘LTC-2 Search’ box where a single or multiple criteria can be identified along with ‘Case Status’ and ‘Request Type’.
This search option combines the use of ‘Case Status’ and specific criteria allowing the user to identify more than one criteria to find a single or multiple record(s).

- Available Criteria:
  - First & Last Name; SSN; LTC-2A Submission Date
  - Other identified criteria is not applicable to the NF user, including: NF Screener; SS Processing; Assigned Clinician
  - Any inputted criteria searches for the LTC-2A record only.
  - Sorting by column headers can assist in locating other LTC2 request types.
- Users must ‘Clear Search’ or a Browser Refresh to conduct a new search.
- **NOTE:** Enhanced search functionality will be enabled in the future.
Portal navigation is dependent on the current status of a particular LTC2 request.

Status updates, along with email notifications allow the NF user to know if a request cannot be processed, if any additional action is required, or to obtain the final OCCO Outcome related to the request.

For OCCO users, the status updates identify need for processing as applicable.
Case Status Updates

Status updates enable the NF (and OCCO) to view the current processing of each LTC2 request:

<table>
<thead>
<tr>
<th>STATUS</th>
<th>DEFINITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submitted</td>
<td>System generated. LTC2 request submitted to OCCO and pending processing.</td>
</tr>
<tr>
<td>Hold</td>
<td>OCCO generated. Requires OCCO investigation prior to processing or an LTC-2B submitted submission with a valid EARC prior to 60 days of admission.</td>
</tr>
<tr>
<td>Inappropriate Referral</td>
<td>OCCO generated. OCCO unable to process request. System generated email notification to NF user. Request closed.</td>
</tr>
<tr>
<td>RFI (Request for Information)</td>
<td>N/A to Phase I. Relates to LTC-2E only. OCCO Reviewer generated requesting additional information. System generated email notification to NF user.</td>
</tr>
<tr>
<td>RFI Response</td>
<td>N/A to Phase I. Relates to LTC-2E only. NF user generated response to RFI.</td>
</tr>
<tr>
<td>OCCO Outcome</td>
<td>OCCO Assessor generated outcome of LTC-2B OCCO assessment. System generated email notification to NF user.</td>
</tr>
<tr>
<td>Complete</td>
<td>OCCO SS generated. Processing complete and request closed.</td>
</tr>
</tbody>
</table>

LTC-2A, Notice of Admission

- LTC-2A GENERAL CONSIDERATIONS
- CREATING A NEW LTC-2A
- ATTACHING DOCUMENTS TO THE LTC-2A
- OCCO PROCESSING OF LTC-2A
LTC-2A General Considerations

- Each section of the LTC-2A must be completed in its entirety prior to moving to the next section (page). The ‘Action buttons’ described on the next slide assist the user in identifying errors.

- 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 types can be submitted for a resident unless the LTC-2A, Notice of Admission is submitted as required.
  - When linked to an EARC, field data will auto-populate to the LTC-2A.

LTC-2A General Considerations (continued)

- Action buttons at the bottom of each section of the data entry screen:
  - ‘Previous’ returns the user to the prior page.
  - ‘Save’ checks for errors/missing detail and keeps the user on the current page.
    - Errors are displayed at the item that requires completion.
  - ‘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.
Creating A New LTC-2A – EARC Search

- To initiate a new LTC-2A, the NF user must be in the App Type ‘LTC-2’ and click the button, which is located on the left upper corner of the landing page.
  - The ‘Quick Links’ navigation pane will open where the NF 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.

Creating a New LTC-2A

- Conduct search for valid EARC (criteria: EARC Conf. # or Social Security Number). If present, select applicable EARC to link to LTC-2A, then click ‘Start LTC-2A’.
  - Linking the record is critical to the NF to allow for Medicaid billing to the date of admission in the event the resident obtains both financial and clinical eligibility for Medicaid enrollment.
  - Important - Use caution when selecting an EARC from the search. 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 prior to submission.
Creating a New LTC-2A

- The LTC-2A begins with an Acknowledgement statement; insert check in 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 the PASRR Level I (regardless if positive or negative); and when applicable the Level II Determination.
  - 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.

Creating a New LTC-2A
Existing LTC2 Record Message Prompt

- Following input of resident demographics, the system will check for an existing open 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 open 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 prior NF record closure.
  - 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.

Creating a New LTC-2A

![LTC-2A creation screenshot]
Creating a New LTC-2A

Attaching Documents to the NEW LTC-2A

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

- 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
- Click ‘Choose Attachment’ and browse computer for the applicable file. Once the document is identified click ‘Attach’.
- 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.
- Click into the box prior to the attachments statement, followed by clicking ‘Save and Next’.
- 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.
- Click ‘Save and Submit’ for transmission to OCCO through the portal.
Attaching Documents to the NEW LTC-2A

Complete all the steps...

- Acknowledgement
- Resident Demographics
- Provider Information
- LTC-2A Notice of Admission
- LTC-2A Attachments
  - Resident Name: Mildred Johnson
  - Select attachment type: PASR Level I
  - By proceeding with this LTC-2A, you acknowledge all necessary documentation is attached, including the required PASR Level I

Attaching Documents to the NEW LTC-2A

By proceeding with this LTC-2A, you acknowledge all necessary documentation is attached, including the required PASR Level I and PASR Level II Determination if applicable.
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: OCCO Processing Steps

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

<table>
<thead>
<tr>
<th>SUBMISSION STATUS</th>
<th>SCENARIO and OCCO PROCESSING STEPS</th>
</tr>
</thead>
</table>
| Submitted         | • Linked to EARC, requires OCCO input of Medicaid provider # in NJ MMIS.  
                   | • Following processing, OCCO updates status to ‘Complete’. |
| Complete          | • Not linked to EARC, no OCCO processing required. |
Overview of the LTC2 Record

<table>
<thead>
<tr>
<th>Confirmation Number</th>
<th>Resident</th>
<th>Nursing Facility</th>
<th>Date of Admission</th>
<th>Discharge Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>LTC2-A000001311</td>
<td>Mildred Johnson</td>
<td>OCCO Nursing Facility</td>
<td>2022-01-18</td>
<td></td>
</tr>
</tbody>
</table>

LTC-2 Full Submission History:

<table>
<thead>
<tr>
<th>Submission Type</th>
<th>Status</th>
<th>Status Updated</th>
<th>OCCO Outcome</th>
<th>OCCO Date</th>
<th>Attachments</th>
</tr>
</thead>
<tbody>
<tr>
<td>LTC-2 A</td>
<td>Submitted</td>
<td>1/16/2022 10:56 AM EST</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>LTC-2 B</td>
<td>Complete</td>
<td>1/16/2022 12:04 PM EST</td>
<td>APPROVAL</td>
<td>1/17/22</td>
<td></td>
</tr>
<tr>
<td>LTC-2 C</td>
<td>Submitted</td>
<td>1/16/2022 04:15 PM EST</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>LTC-2 D</td>
<td>Submitted</td>
<td>1/16/2022 04:25 PM EST</td>
<td>No</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
LTC2 Record

The LTC2 serves as the client record for an entire NF admission, which begins with submission of the LTC-2A. An individual may have *multiple LTC2 records to represent each new admission*.

- **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, current status updates and applicable comments and/or 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
  - LTC-2D, Section Q Referral
  - LTC-2E, NF Clinical Screen
  - LTC-2F, Notice of Discharge
  - Attachments – provides a listing of all attachments and the LTC2 request type it was “attached to”.

**NOTE**: LTC-2C, LTC-2D and LTC-2E implementation set for Phase II.

LTC2 Record (continued)

- **LTC2 Record Heading**: This detail provides the basic information related to the LTC2 record, including:
  - Confirmation Number
  - Resident (name)
  - Nursing Facility
  - Date of Admission
  - Discharge Date

- **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 for the record.
**LTC2 record (continued)**

- **LTC-2 Full Submission History:** Listing of 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 for any action, review, or for more details.
  - 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: OCCO outcome or determination.
  - OCCO Date: Date of the OCCO outcome/determination.
  - Attachments: Indicates whether attachments were submitted with the request type (‘Yes’ or ‘No’)

**LTC2 Record (continued)**

- **LTC-2A Submission Detail:** NF submitted 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.
  - If no EARC/not linked, 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’
  - Updates to demographics conducted by OCCO staff only.
  - If demographic updates required, direct notification to OCCO required.
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 before clicking into ‘OCCO Outcome’ or ‘Status Update’.
- **Request New LTC-2[type]**: Action button used by OCCO staff to create a new LTC2 request when indicated (e.g., NEW LTC-2B, NEW LTC-2F)
  - If grayed out, an active request is open. No new requests permitted until the prior request is completed.
- **OCCO Outcome**: Click to view the full detail of the final OCCO Outcome/Determination.
- **Status Update**: Click to open Status update history from the point of submission.
LTC-2B, Request for Clinical Assessment

LTC-2B Considerations

- Residents requiring a clinical eligibility assessment will require submission of the LTC-2A, Notice of Admission prior to the submission of the LTC-2B.
- NF shall review LTC-2B criteria to ensure request is appropriate.
  - Individuals who will not become Medicaid eligible or require Medicaid billing are not appropriate referrals for clinical eligibility.
  - NF providers are responsible for identifying payer source and potential eligibility.
- Individuals admitted with a valid EARC are not eligible for assessment until day 60 of NF admission as per standard operating procedures (SOP). Therefore, the LTC-2B shall not be submitted prior to day 60 of admission.
  - NOTE: Main landing grid provides the admission day count column ('Days') to assist with this timeframe.
Creating a NEW LTC-2B

- Conduct a search of the portal for an existing LTC2 record to initiate LTC-2B request.
  - To locate a single record click the *Case Status* of ‘Complete’ and utilize the *LTC-2 Search* functionality with applicable criteria, such as ‘Last Name’ and/or ‘SSN’.

Creating a NEW LTC-2B

- From the grid listing, click to open record, then click into LTC-2B record tab, followed by clicking ‘Request New LTC-2B’ action button.
  - *NOTE:* If a prior LTC-2B remains open, the ‘Request New LTC-2B’ button will be inactive.
Creating a NEW LTC-2B

- Select the ‘Reason for Request OCCO Clinical Assessment’ and related detail as applicable.
- Click ‘Save and Submit’ at the bottom of the screen, then click the ‘Reload’ action button to refresh the record to confirm submission to OCCO.

NEW LTC-2B Submission

- After submission, case status auto-updates to ‘Submitted’ awaiting OCCO processing.
- **Reminder**: LTC-2B submissions for residents admitted with a valid EARC will not be assigned for OCCO assessment until day 60 of admission as per SOP.
  - Case status updated by OCCO to ‘Hold’ for these instances.
- Submission of a second LTC-2B is not permitted if an existing LTC-2B request is open.
### LTC-2B: Initial OCCO Processing

The following outlines the potential LTC-2B status updates for initial OCCO processing:

<table>
<thead>
<tr>
<th>CASE STATUS</th>
<th>WHEN STATUS USED</th>
<th>OCCO ACTION</th>
</tr>
</thead>
</table>
| Hold                | • Resident admitted with authorized EARC, assignment of assessment not required until day 60 of admission.  
                       | **NOTE:** No email notification provided.                                            | 1. Monitor HOLD status for admission day >60, then process for assignment to OCCO clinician.                                                  |
| Inappropriate Referral | • Unable to process request for identified reason;  
                                | • Request closed  
                       | **NOTE:** Portal generated email notification sent to NF/NF user.  
                       | 1. Identify ‘Reason’ for Inappropriate Referral:  
                                | • Valid Clinical Assessment on File  
                                | • MCO or PACE enrolled  
                                | • Other  
                       | 2. Comments (limited detail to expand on reason when necessary)                     |  |
| Assigned            | • Appropriate request and assigned for clinical assessment; Pending OCCO assessment outcome  
                       | **NOTE:** Reassignment of clinician may occur when indicated.                       | 1. Assign OCCO Clinician:  
                       | 2. Comments (limited detail to expand on reason when necessary)                     |  |

### LTC-2B, Inappropriate Referral – Email Notification

This notice is to inform you that the **LTC-2B, Request for OCCO Assessment submitted for Thomas Jones, B-0513** cannot be processed at this time. Please proceed to the NF Portal to review the reason the referral cannot be processed and to determine if any additional action is required.

Should you have any questions, please outreach the respective OCCO to discuss.

**NORTHERN REGIONAL OCCO:** (732)377-4650

**County coverage area:** Bergen, Essex, Hudson, Morris, Passaic, Sussex, Warren, Hunterdon, Middlesex, Somerset, Union

**SOUTHERN REGIONAL OCCO:** (609)704-6050

**County coverage area:** Atlantic, Burlington, Camden, Cape May, Cumberland, Gloucester, Mercer, Monmouth, Ocean, Salem
LTC-2B Status – Inappropriate Referral

• Following receipt of the ‘Inappropriate Referral’ notification email, open the record to access the details why the referral cannot be processed.
  o Search for and access the LTC-2B tab of the record, click the LTC-2B confirmation number to open request, followed by clicking the ‘Status Update’ action button, then scrolling to the bottom of the page to view the ‘Reason for Inappropriate Referral’. Referral closed.

LTC-2B – OCCO Processing

• If the record can be processed for a clinical assessment, OCCO will update the case status to ‘Assigned’, indicating the assigned OCCO Clinician.
  o If LTC-2B is in a ‘Hold’ status for EARC, following 60 days of NF admission OCCO will update status to ‘Assigned’.
    - Main landing grid listing provides a column to indicate days since admission.
  o No email notification; status remains until OCCO outcome has been made.
  o OCCO to respond to request within stated timeframes
• Following completion by OCCO assessor, the LTC-2B status will be updated to ‘OCCO Outcome’.
  o Portal generated email sent to NF/NF user to advise of need to view the outcome within the portal.
• Following full OCCO processing, LTC-2B status updated to ‘Complete’.
**LTC-2B: OCCO Outcome, Email Notification**

This message came from an EXTERNAL address (njsave.noreply@dhs.state.nj.us). DO NOT click on links or attachments unless you know the sender and the content is safe. Suspicious? Forward the message to spamreport@cyberrn.gov.

This notice is to inform you that the **LTC-2B, Request for OCCO Assessment** for [Name], has been reviewed by OCCO and a final outcome provided. Please proceed to the NF Portal to review the final OCCO outcome so that you may conduct next steps specific to this outcome.

Should you have any questions, please outreach the respective OCCO to discuss.

**NORTHERN REGIONAL OCCO:** (732)777-4650  
County coverage areas: Bergen, Essex, Hudson, Morris, Passaic, Sussex, Warren, Hunterdon, Middlesex, Somerset, Union

**SOUTHERN REGIONAL OCCO:** (609)704-6050  
County coverage areas: Atlantic, Burlington, Camden, Cape May, Cumberland, Gloucester, Mercer, Monmouth, Ocean, Salem

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**LTC-2B: OCCO Outcomes**

<table>
<thead>
<tr>
<th>OCCO OUTCOME</th>
<th>OTHER DETAIL/REASON</th>
<th>OTHER OCCO ACTION</th>
</tr>
</thead>
</table>
| **Approval (NF LOC)**                | 1. Nursing Facility Level of Care in a nursing facility or the community  
2. Date of clinical eligibility approval | LTC-13 (NF Level of Care) or LTC-46 (Hospice) approval letter mailed to resident/legal representative. |
| **Approval (SCNF LOC)**              | 1. Special Care Nursing Facility (SCNF) Level of Care  
2. [SCNF Type]  
3. Date of clinical eligibility approval | LTC-13 approval letter mailed to resident/legal representative. |
| **Denial (NF LOC)**                  | 1. Nursing Facility Level of Care in a nursing facility or the community  
2. Date of clinical eligibility denial | Full denial packet, including LTC-14 (NF Level of Care) denial letter mailed to resident/legal representative. |
| **Denial (SCNF LOC)**                | 1. Special Care Nursing Facility (SCNF) Level of Care  
2. [SCNF Type]  
3. Date of clinical eligibility denial | Full denial packet, including LTC-14 denial letter mailed to resident/legal representative. |
| **Denial – SCNF / Approval - NF**    | 1. [SCNF Type]  
2. Date of clinical eligibility approval | Full denial packet including LTC-14 denial letter, and LTC-13 approval letter mailed to resident/legal representative. |
| **Notification of Non-Completion of Assessment** | 1. [Reason]  
   - Dismissed  
   - Withdrawn  
   - Expired | OCCO comments included in LTC-2B OCCO Outcome section to indicate reason for non-completion of the assessment. |
LTC-2B: Accessing OCCO Outcome & Next Steps

- Search for and open LTC2 record, click into LTC-2B tab, followed by clicking the LTC-2B Conf #. Once open, click the ‘OCCO Outcome’ action tab to view outcome details.
- NF shall proceed to conduct the following dependent upon the documented OCCO Outcome:
  - ‘APPROVAL’: NF to educate resident/legal representative on establishing Medicaid financial eligibility and monitor eMEVs/REVs for eligibility status.
  - ‘DENIAL’: The NF to initiate discharge planning discussion with resident/legal representative to explore community options. **NOTE:** The resident has 20 days from the date on the denial letter to request a fair hearing.
  - ‘NOTIFICATION OF NON-COMPLETION OF ASSESSMENT’: If an assessment is required at a later date, the NF must submit a new LTC-2B.

LTC-2B: Administrative Action (AA)

- In limited instances, a prior OCCO Outcome may require modification by OCCO
  - Reasons for AA: 1) Additional information received, or 2) Documentation error
- Only OCCO Administrative Users (supervisors) may make an Administrative Action update.
- Update prompts an ‘URGENT’ portal generated email notification to the NF/NF user, directing user to the portal to view the detail of the updated outcome.
- Updated outcome added to the history listing and is differentiated from the prior outcome by including ‘(AA)’ in the OCCO Outcome column.
- Case status auto-updated to ‘OCCO Outcome’ for continued OCCO processing.
- NF responsible to notify all necessary parties of the modified and updated OCCO Outcome. Other processing considerations specific to outcome.
**LTC-2B, Administrative Action: Email Notification**

This message came from an EXTERNAL address. DO NOT click on links or attachments unless you know the sender and the content is safe. Suspicious? Forward the message to spamreport@cyber.nj.gov.

**IMPORTANT:** This notice is to inform you that the LTC-2D: Section Q Referral for D-40179 has been modified to reflect a new determination.

This modification invalidates any prior notification of an OCCO Outcome. It is important that you return to the NF portal to review the related detail. If notification to other parties of the prior OCCO Outcome has occurred, it is your responsibility to notify those parties of this modification.

Any questions should be directed to the respective OCCO:

**NORTHERN REGIONAL OCCO:** (732)777-4659
**County coverage area:** Bergen, Essex, Hudson, Morris, Passaic, Sussex, Warren, Hunterdon, Middlesex, Somerset, Union

**SOUTHERN REGIONAL OCCO:** (609)704-6650
**County coverage area:** Atlantic, Burlington, Camden, Cape May, Cumberland, Gloucester, Mercer, Monmouth, Ocean, Salem

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**LTC-2B: Administrative Action**

An Administrative Action is differentiated from original OCCO Outcome by displaying ‘(AA)’ in the LTC-2B History, OCCO Outcome grid column:

[LTC-2B Administrative Action Diagram]
LTC-2B: Administrative Action

Creating a NEW LTC-2F, Notice of Discharge
LTC-2F, Notice of Discharge

- The LTC-2F, Notice of Discharge is required for NF discharges to close out portal submission of an LTC-2A.
- NF required to document date of discharge, location and address of discharge location.
- Upon submission of the LTC-2F, the record is closed and no additional requests may be submitted.
  - Billing assistance requests are processed outside of the portal as per SOP.
- If outstanding LTC2 requests the LTC-2F case status will be updated to ‘Hold’. OCCO will outreach the NF to inquire if Medicaid billing is required to determine if an assessment is still indicated.
- Any resident readmitted after a break in service requires the submission of a new LTC-2A to open a new record (e.g., Resident discharged to the Community, Assisted Living, or Psychiatric Hospital and readmitted to the same NF).

Creating a NEW LTC-2F

- [Image of LTC-2F notice of discharge process]
Creating a NEW LTC-2F

- Conduct a search of the portal for existing LTC2 record to initiate LTC-2F.
  - To locate a single record click the Case Status of ‘Complete’ and utilize the LTC-2 Search functionality with applicable criteria, such as ‘Last Name’ and/or ‘SSN’.
- Open applicable record, click into the LTC-2F tab and select ‘Request New LTC-2F’.
- Complete all fields as applicable to discharge scenario, followed by clicking ‘Save and Submit’.

Creating a NEW LTC-2F

- Click ‘Reload’ to refresh record to verify LTC-2F submission.
  - Discharge date will be indicated in record header.
Creating a NEW LTC-2F

Upon receipt, OCCO will review the LTC2 record to determine if outstanding requests remain.

- If open LTC-2B request is present, the case status will be updated to ‘Hold’ and remain in this status until complete.
  - OCCO will outreach NF to determine if Medicaid billing required to determine need for clinical eligibility assessment.
- If no open LTC-2B request, case status updated to ‘Complete’.
  - No additional OCCO processing required.
LTC-2F Considerations

- The NF Portal allows one **active** LTC2 record for a resident. Failure to submit the LTC-2F, Notice of Discharge for a resident who has transferred to another facility will delay the ability of a receiving facility to submit the required LTC-2A, Notice of Admission.

- If a receiving facility identifies an inability to submit a LTC-2A for a new resident, outreach to the respective OCCO is required.
  - 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 creation of the LTC-2A.

Questions?
Portal Support and LTC2 Processing Inquiries

- For **NF Portal issues**, send email to: DoAS-NFPortal.Registration@dhs.nj.gov
  - Subject Line: NF Portal Issue
  - Email Body: Include a description of the issue being reported. When able, recommend to include screenshots to assist support staff to better understand reported issue. Include a telephone contact number for direct outreach if necessary.

- For **LTC-2 Processing inquiries**, contact respective OCCO:
  - **NORTHERN REGIONAL OCCO**: (732)777-4650  
    County coverage area: Bergen, Essex, Hudson, Morris, Passaic, Sussex, Warren, Hunterdon, Middlesex, Somerset, Union
  - **SOUTHERN REGIONAL OCCO**: (609)704-6050  
    County coverage area: Atlantic, Burlington, Camden, Cape May, Cumberland, Gloucester, Mercer, Monmouth, Ocean, Salem
NF Portal – Implementation Plan

Implementation Plan

- NF Portal registration is ongoing. Portal access provided on a first come first basis.
- 'GO LIVE’ date expected 7/5/2022 for registered NF users.
  - Registered portal users will receive email from Salesforce to initialize portal user access.
  - **Reminder:** User has 24 hours to establish portal access. If not accessed within 24 hours the link expires; user must outreach DoAS-NFPortal.registration@dhs.nj.gov to request a resend.
- All Medicaid certified NFs and SCNFs are encouraged to obtain registered access to the NF Portal, submit all new admissions via the NF portal, and discontinue email submissions of the LTC-2 form.
- Upon registration and access to the NF Portal, the registered facility will no longer be permitted to submit LTC-2 forms via email in most circumstances.
Guidelines for Registered NF Portal Users

- **New Facility Admissions (LTC-2A)**
  - Once a provider obtains access to the NF portal, all activity for new admissions is to be completed via the portal only. Email submissions will not be accepted.

- **Request for PAS/Clinical Eligibility (LTC-2B)**
  - Once a provider obtains access to the NF portal, all activity for requests for PAS/clinical eligibility is to be completed via the portal only. Email submissions will not be accepted.
  - LTC-2A must be present in the portal system. NF provider is responsible to create a new Notice of Admission to enable creation of an LTC-2B when necessary. This is regardless of whether a prior LTC-2A was submitted via email. **This is the only instance in which a duplicate LTC-2A is required.**

- **Notice of Discharge (LTC-2F)**
  - Notice of Discharge submission is dependent on how the LTC-2A and LTC-2B (if applicable) were submitted.
    - If both the LTC-2A and LTC-2B are via the NF portal, then the Notice of Discharge must also be via the portal. Email submissions will not be accepted.
    - If an LTC-2A was submitted and accepted via email and the only other activity required is a Notice of Discharge (no request for PAS/Clinical Eligibility required), then the Notice of Discharge can be completed via email to close the resident record.
LTC2 Transition Scenarios

**Scenario 1:** Notice of Admission occurred prior to portal access; Notice of Discharge occurs after portal access

- If Notice of Admission has been processed via email, then the Notice of Discharge will also occur via email. No portal use required for this situation.

**Scenario 2:** Notice of Admission and Request for PAS/Clinical Eligibility occurred prior to portal access; Notice of Discharge occurs after portal access

- If Notice of Admission and Request for PAS/Clinical Eligibility have both been processed via email, then the Notice of Discharge will also occur via email. No portal use required for this situation.

**Scenario 3:** Notice of Admission occurs prior to portal access; Request for PAS/Clinical Eligibility required after portal access

- If a Request for PAS/Clinical Eligibility is required after portal access, both an LTC-2A Notice of Admission and LTC-2B Request for PAS must be created electronically via the NF Portal. No email is permitted.

**Scenario 4:** Notice of Admission occurs after portal access; All subsequent activity occurs after portal access

- If a Notice of Admission is entered into the portal, all subsequent activity (LTC-2B or LTC-2F) must be created electronically via the NF Portal. No email is permitted.
### LTC2 Transition Scenarios

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Notice of Admission Submission Method</th>
<th>Request for PAS/Clinical Eligibility Submission Method</th>
<th>Notice of Discharge Submission Method</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Email</td>
<td>N/A</td>
<td>Email</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Email</td>
<td>Email</td>
<td>Email</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Email* Portal</td>
<td>Portal</td>
<td>Portal</td>
<td>*If Request for PAS/Clinical Eligibility is required after portal access, an LTC-2A must be created within the Portal, even if previously submitted via email.</td>
</tr>
<tr>
<td>4</td>
<td>Portal</td>
<td>Portal</td>
<td>Portal</td>
<td></td>
</tr>
</tbody>
</table>

- Refer to LTC2 Transition Guidelines document for full details.

### Looking Forward

- Phase II implementation is to be determined for a later date in 2022, which is to include the following LTC2 request types:
  - LTC-2C, Notice of MCO or PACE Disenrollment
  - LTC-2D, Section Q Referral
  - LTC-2E, Nursing Facility Clinical Screen
Questions?

LTC2 Registration Team - Contacts

- NF Portal training, registration forms and related material can be found at:
  - [https://www.state.nj.us/humanservices/doas/resources/](https://www.state.nj.us/humanservices/doas/resources/)
- Email: DoAS-NFPortal.Registration@dhs.nj.gov
  All communication related to the NF Portal including registration form submissions and requests for portal support are to be sent to this email address. This email account is monitored during state business hours and routed to the subject matter expert.
- Deanna Freundlich, Project Lead
  - Deanna.Freundlich@dhs.nj.gov
- Elizabeth Brennan, Program Director
  - Elizabeth.Brennan@dhs.nj.gov