Michigan Department of Technology, Management & Budget

3877-78 User Manual for Facility Users
OBRA
(Omnibus Budget Reconciliation Act)

COPYRIGHT INFORMATION

Revision History

Name	Description	Version	Date
DEEPAK MALIAKAL & JAVED KHIZER	DRAFT VERSION	1.0	06/30/2020
DEEPAK MALIAKAL & JAVED KHIZER	UPDATED WITH SCREENSHOTS	1.1	09/09/2020

Contents

Accessing the OBRA application (MILogin)

MILogin is the new State of Michigan Identity, Credential and Access Management (MICAM) solution. The MILogin solution will provide enhanced single sign-on (SSO) capabilities in addition to meeting many other business requirements and security and compliance needs. MILogin will improve overall functionality, security and compliance with federal and state regulations, such as HIPAA.
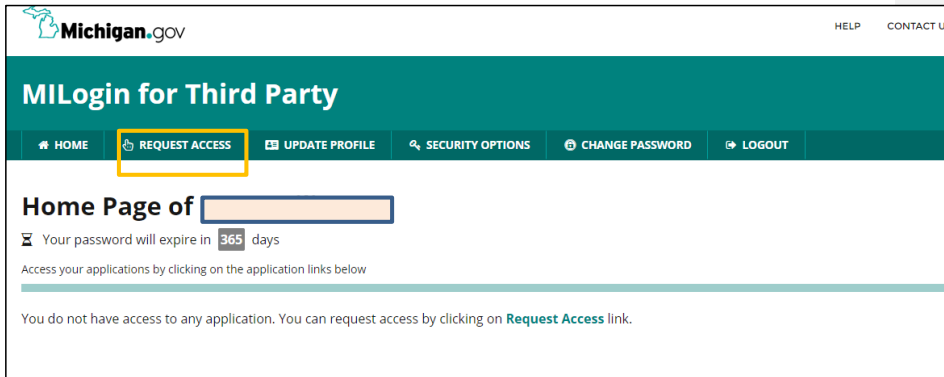
If you are a new user to the MILogin State of Michigan MICAM solution, you must register to create your User ID and Password.

MDHHS Employees and Contractors with a SOM network ID and SOM email address (@michigan.gov) will access MILogin through this link https://miloginworker.michigan.gov. Employees and Contractors who are logged into their computer through LAN (local access network) or VPN will not need to separately sign in to MILogin.

MDHHS Providers or Advocates without a SOM network ID and SOM email address will access MILogin through this link https://milogintp.michigan.gov. Current Providers and Advocates will use their Single Sign-On user ID and password to sign in to MILogin and access their applications.

Requesting access to the OBRA application

After successful MILogin login, click the **Request Access** button as shown below highlighted in orange to request access to the OBRA application.
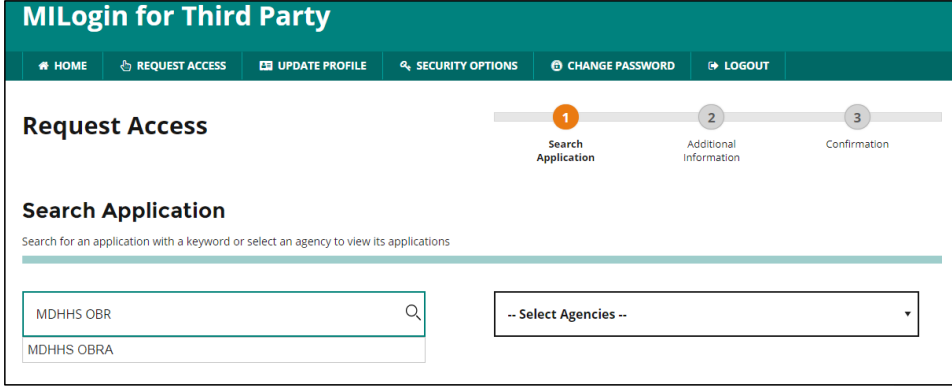
Once clicked, the system will display the **Request Access** screen as shown below. Follow the guidelines/steps listed on the screen to select MDHHS OBRA and click the **Request Access** button to submit.

Step1: Type MDHHS OBRA and the application will be populated in the dropdown below.

Step2: Click on MDHHS OBRA on the dropdown, and then the below section will appear, highlighted in Orange color.
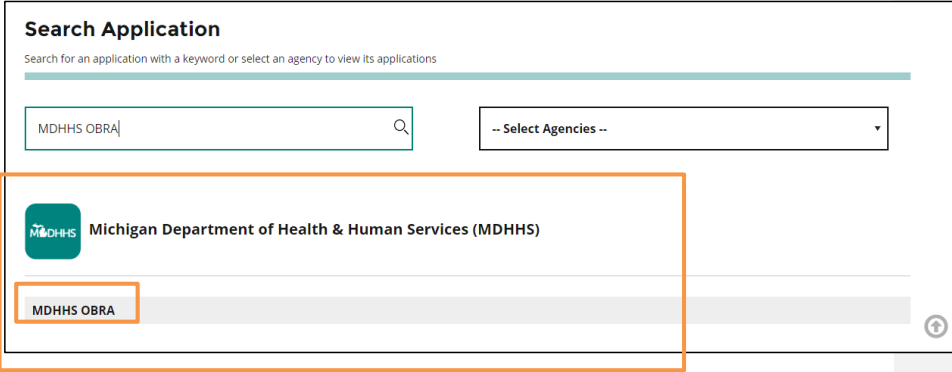
Click the name of the application being requested and agree to the terms and conditions.

Click the **"Request Access"** button to initiate the request for access.

Request Access

Additional Information

Provide following information to submit your access request

* Required

*Email Address

tst@facility.com

Mobile Number

*Work Phone Number

SUBMIT   RESET

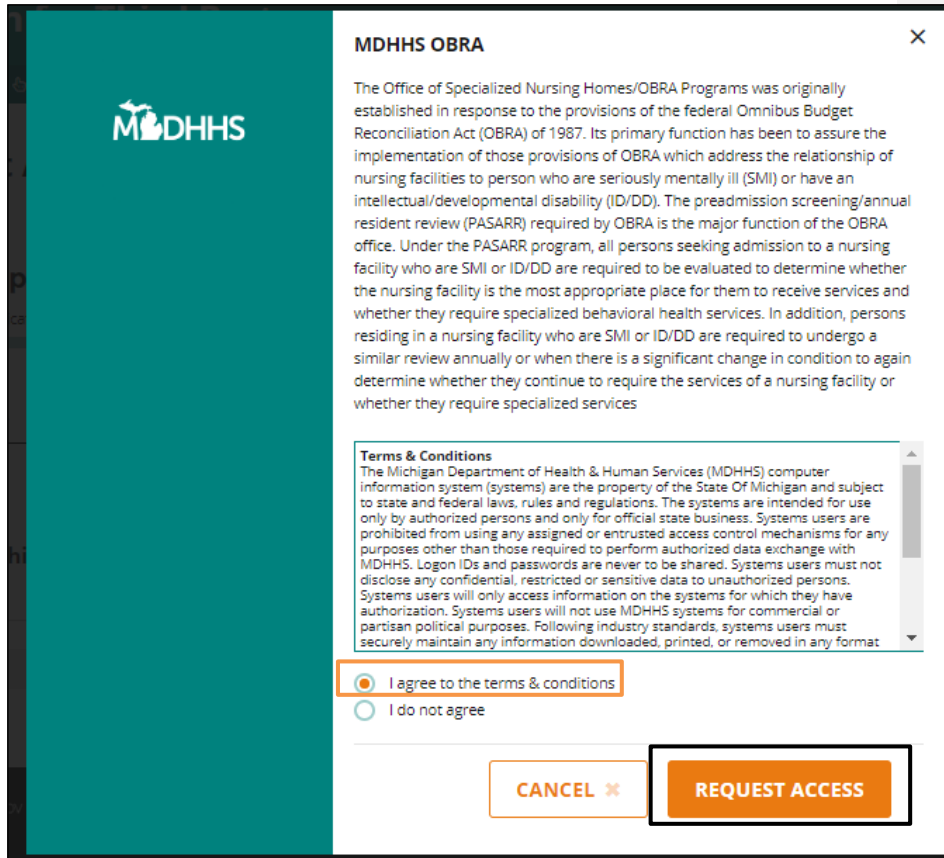Click on Submit button and the system will display a confirmation screen as shown below indicating that the request for access has been successfully submitted.

Request Access

1	2	3
✔ Search Application	✔ Additional Information	Confirmation

Confirmation
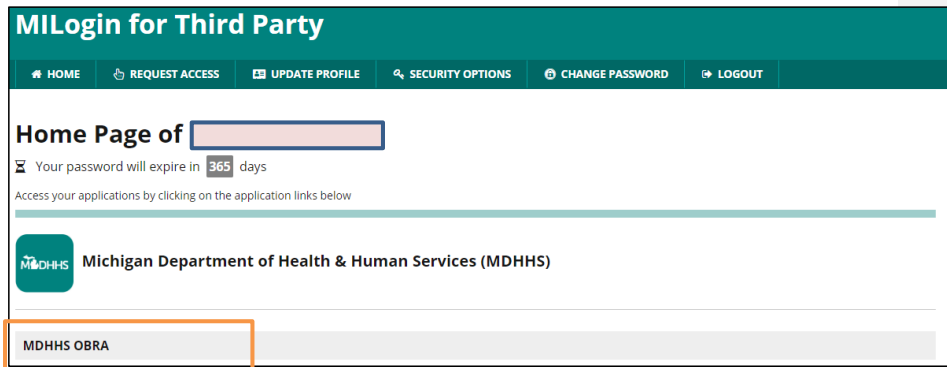
✔ Success

The request for your access has been successfully submitted.

You will see the updated list of application(s) on your home page once it is processed.

HOME

Once your subscription request to the MDHHS OBRA application has been processed the application link will be available the next time you login to your MILogin account.

Click on the "MDHHS OBRA" link as shown above in order to proceed further and access the application.

Click the **Acknowledge/Agree** button to proceed with MILogin Multifactor Authentication.
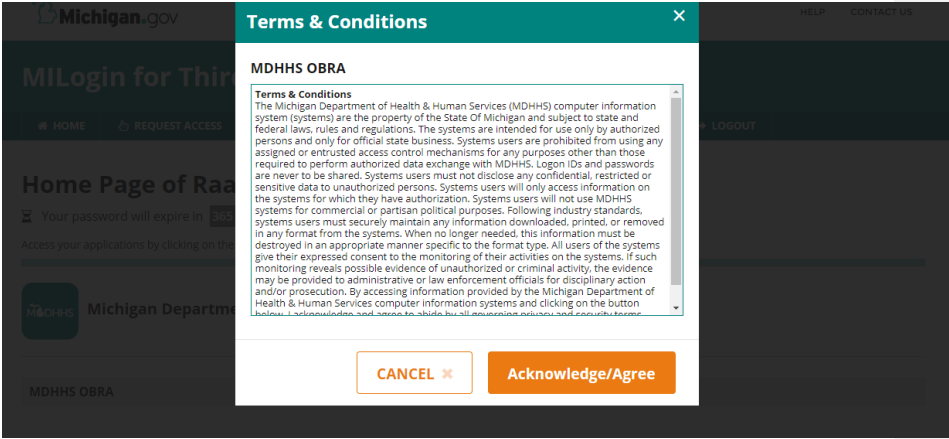
Select one of the following options to proceed with the MILogin Multifactor Authentication.
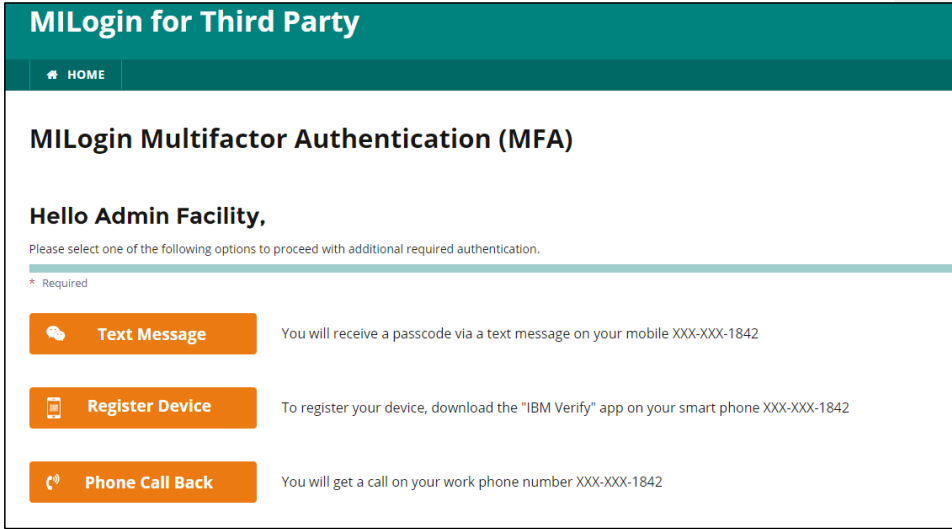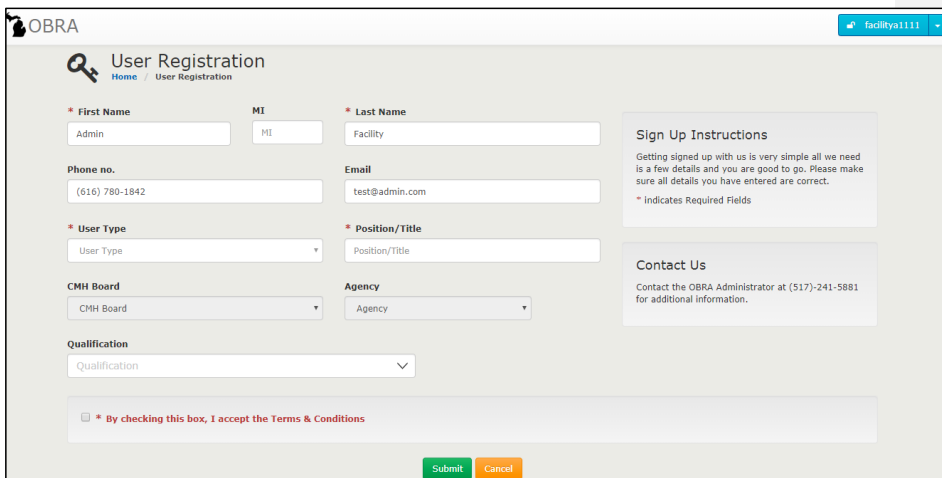
Once successfully authenticated, the system will present the user with their respective **Main Dashboard** based on their assigned role or with the message indicating that Registration is required.

Requesting permissions to the OBRA application

Registration is also required to be granted permissions to the OBRA application. Click the **Register** button to begin the registration process.
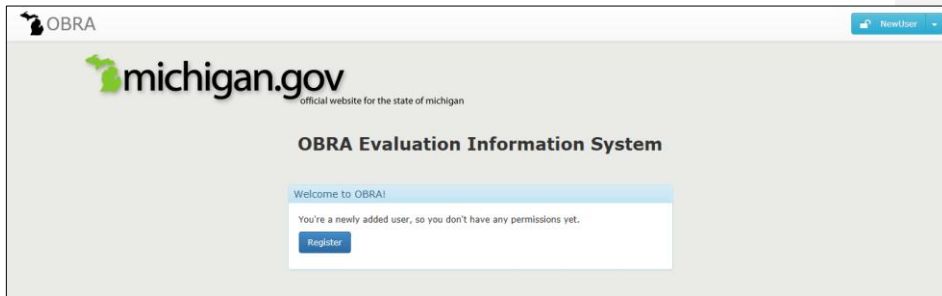
Click on Register button. Fields that are suffixed with this icon are required fields. Data must be entered in these fields.

Upon entering various information on the screen, there will be additional fields needed based on the user type and role.

Note: It is important that the appropriate User Type is selected based on the role/function that is being performed/provided.

MDHHS-OBRA Staff: This User Type is reserved for only MDHHS OBRA staff.

CMH: This User Type is reserved for those providing the CMH Coordinator and CMH Clerk functions.

Qualified Professionals: This User Type is reserved for those performing the Qualified Professional / Assessor role.

CMH/Qualified Professional: This User Type is reserved for those performing both the CMH Coordinator function and Qualified Professional/Assessor roles.

3877/78 Admin: This User Type is reserved for those providing administrative functions for a Facility Group which is a collection of facilities.

3877/78 User: This User Type is reserved for those entering 3877 Forms, 3878 Forms, admitting Consumers into Facilities and sending the Level-I screening to CMH Agency or discharging the Consumers.

3877/78 View Only: This User Type is reserved for clerical staff who needs to only view the completed 3877 and 3878 Forms in a Facility.

User Selects 3877-78 Admin as User Type:

The following events happen when the User type is 3877/78 Admin:

- CMH Board and Agency fields will be greyed out
- User Role and License Number fields appear, they are mandatory fields.
- Facility Group drop down appears with capability to select only one group and with a "View Facilities" link next to it

If User Role is selected as Facility Admin and any Facility Group is selected from the drop down "View Facilities" link is clicked, it will bring up the list of facilities under the Facility Group.

* **User Role**

Facility Admin ✕

License

License Number

* **Facility Group**

County Group

View Facilities

Qualification

Qualification

Indicates Required Fields

* **User Type**

3877/78 Admin

* **Position/Title**

Position Title

CMH Board

CMH Board

-241-5881

* **User Role**

Facility Adm

* **Facility Group**

County Group

Qualification

Qualification

* **Authorization Document**

Care facilites

- Holland Hospital - 602 Michigan Ave, Holland, OTTAWA - 49423
- Holland Hospital - 602 Michigan Ave, Holland, OTTAWA - 49423
- Hospice of North Ottawa Community - 18525 Woodland Ridge Dr, Spring Lake, OTTAWA - 49456
- Hospice of North Ottawa Community - 1061 S Beacon Blvd, Suite 200, Grand Haven, OTTAWA - 49417
- Laurels of Hudsonville - 3650 Van Buren, Hudsonville, OTTAWA - 49426
- North Ottawa Community Hospital - 1309 Sheldon Rd, Grand Haven, OTTAWA - 49417
- North Ottawa In Home Care Nursing - 1061 S Beacon Blvd Suite 100, Grand Haven, OTTAWA - 49417
- Riverside Nursing Centre - 415 Friant St, Grand Haven, OTTAWA - 49417
- Spectrum Health Zeeland Community Hospital - 8333 Felch St, Zeeland, OTTAWA - 49464
- Sunset Home Services - 725 Baldwin St, Jenison, OTTAWA - 49428

Ok

- As a Facility Admin, an "Authorization document" is mandatory. It can be in a PDF, .doc, or .docx format.

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* **User Role**

Facility Admin ✕

License

License Number

* **Facility Group**

County Group

View Facilities

Qualification

Qualification

* **Authorization Document**
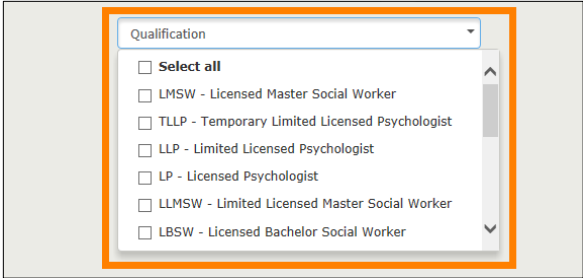
📂 Attach File

☑ * I hereby acknowledge that as a Facility Administrator that I am responsible and liable for granting access to Facility users into OBRA application.

Submit   Cancel

Before submitting the registration, the "I hereby acknowledge that as a Facility Administrator that I am responsible and liable for granting access to Facility users into OBRA application" check box needs to be checked.

 Note: *Likewise, select all valid Qualifications that apply.*

Once the user enters all required fields, click the **Submit** button to submit the registration to the OBRA Administrator for review. Please allow 24-48 hours for the OBRA Administrator to make a decision.
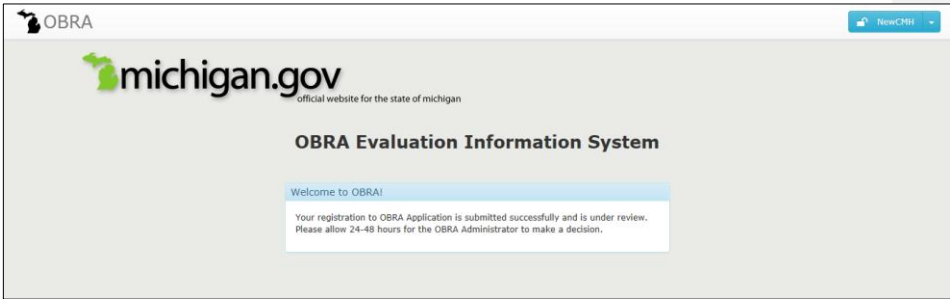
If your registration to the OBRA Application was denied. Contact the OBRA Administrator at (517)-241-5881 for additional information.
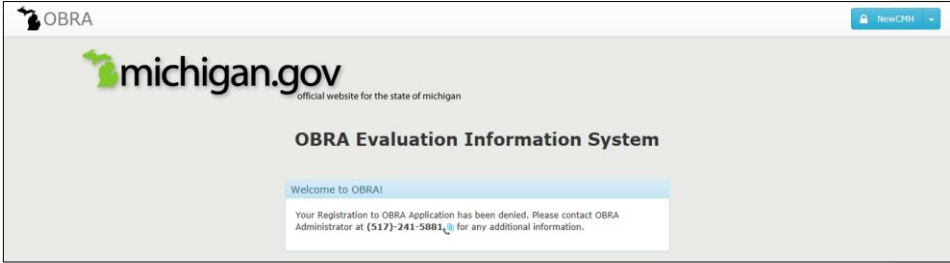
Once the OBRA Administrator has reviewed and approved your registration, you will be automatically logged into the OBRA application through the State of Michigan MILogin portal.

User Selects 3877-78 User as User Type:

The following events happen when the User type is 3877/78 User:

- CMH Board and Agency fields will be greyed out
- User Role and License Number fields appear, they are mandatory fields.
- Facilities drop down appears, with capability to select multiple facilities

User Role dropdown:

Select User Role as Role-3877:

Qualification to be selected:
At least one of RN,LBSW, LLBSW,LMSW,LLMSW,LPC,LLPC,LP,LLP,PA,DO,MD, Nurse Practitioner is mandatory

Select User Role as Role-3878:

Qualification to be selected:
At least one of PA, DO, MD, Nurse Practitioner is mandatory

Select User Role as Facility Admissions:

Qualification to be selected:
Qualification is not mandatory

Select User Role as Facility Worker:

Qualification to be selected:
Qualification is not mandatory

Before submitting the registration, the "By checking this box, I accept the Terms & Conditions" check box needs to be checked.

User Selects 3877-78 View Only as User Type:

The following events happen when the User type is 3877/78 User:

- CMH Board and Agency fields will be greyed out
- User Role and License Number fields appear, they are mandatory fields.
- Facilities drop down appears, with capability to select multiple facilities

User Registration

* First Name

User

MI

MI

* Last Name

Facility

Phone no.

(616) 780-1842

Email

mai@test.com

* User Type

3877/78 View Only

* Position/Title

Position/Title

CMH Board

CMH Board

Agency

Agency

* User Role

Roles

Required

License

License Number

* Facility

Facility

Qualification

Qualification

☐ *** By checking this box, I accept the Terms & Conditions**

Submit   Cancel

Sign Up Instructions

Getting signed up with us is very simple all we need is a few details and you are good to go. Please make sure all details you have entered are correct.

* indicates Required Fields

Contact Us

Contact the OBRA Administrator at (517)-241-5881 for additional information.

🔍 Search

☐ OSF St Francis Hospital and Medical Group Escanaba (MI)

☐ 1st Choice Home Care Warren (MI)

☐ 1st State Home Healthcare Saginaw (MI)

☐ 21st Century Home Health Care Bridgeman (MI)

☐ 24-Seven Home Health Care Services Southfield (MI)

☐ 247 Home Health Care Taylor (MI)

☐ 4 Star Home Health Care Southfield (MI)

...lity

Facility   ∧

User Role dropdown:

☐ View Only

...r Role

Roles   ∧

Select User Role as View Only:

Qualification to be selected:
Not mandatory

Once the user enters all required fields, click the **Submit** button to submit the registration to the Facility Administrator for review. Please allow 24-48 hours for the OBRA Administrator to make a decision.

If your registration to the OBRA Application was denied. Contact the Facility Administrator for additional information.
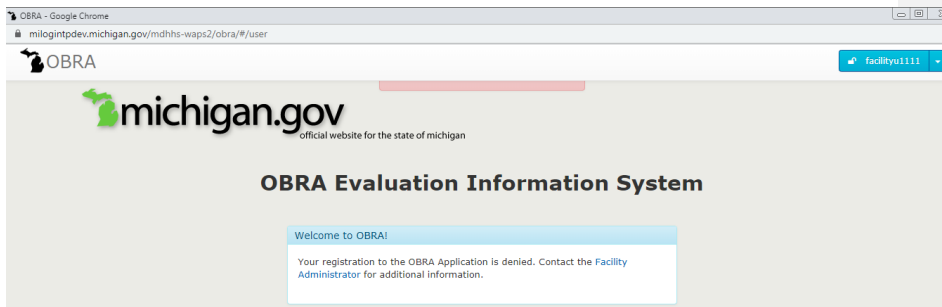
Once the Facility Administrator has reviewed and approved your registration, you will be automatically logged into the OBRA application through the State of Michigan MILogin portal. The first facility that was selected during registration will be the logged in facility.

Note: **If there were multiple facilities in the user registration request and only one of them was approved, the user can still login to OBRA but will have access to only consumers from that approved facility**.

The **Main Dashboard** screen will display after successful login.

Facility Admin

Facility Toggle:

The box highlighted in orange indicates all the facilities that are accessible to the user. The one shown on the top will be the current logged in facility.

Every time this user logs in or switches a facility from facility toggle there would be a message as shown below.

Role-3877 (Splash Page):
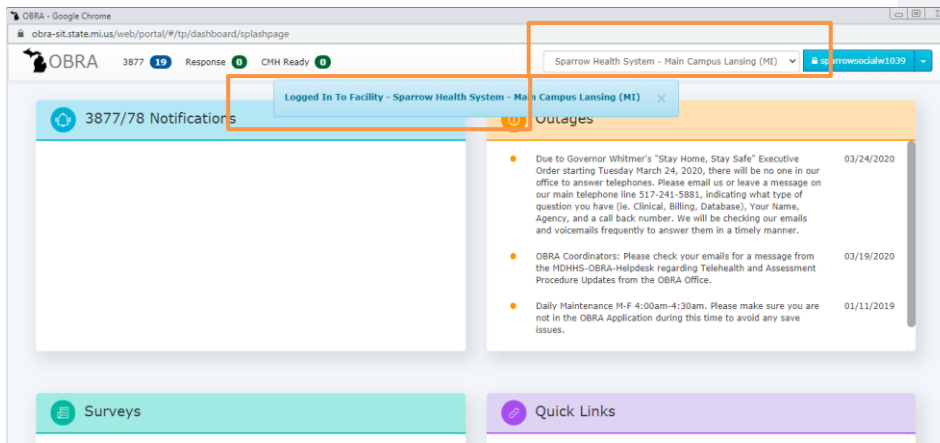
Upon click of "OBRA" link on the top left, dashboard page appears:

Role-3877 (Dashboard):

Facility Toggle:

The box highlighted in orange indicates all the facilities that are accessible to the user. The one shown on the top will be the current logged in facility.

Role-3878 (Dashboard)
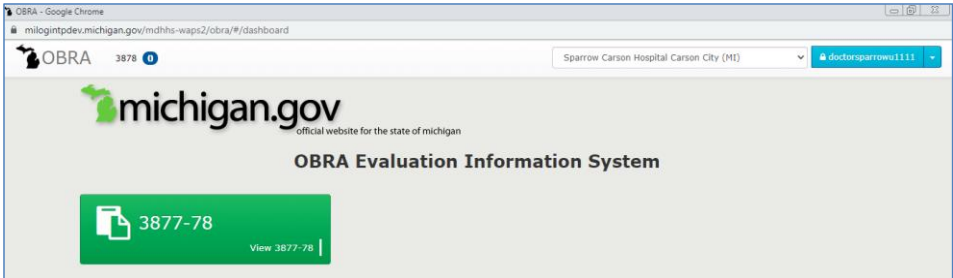
Facility Admissions (Splash Page):
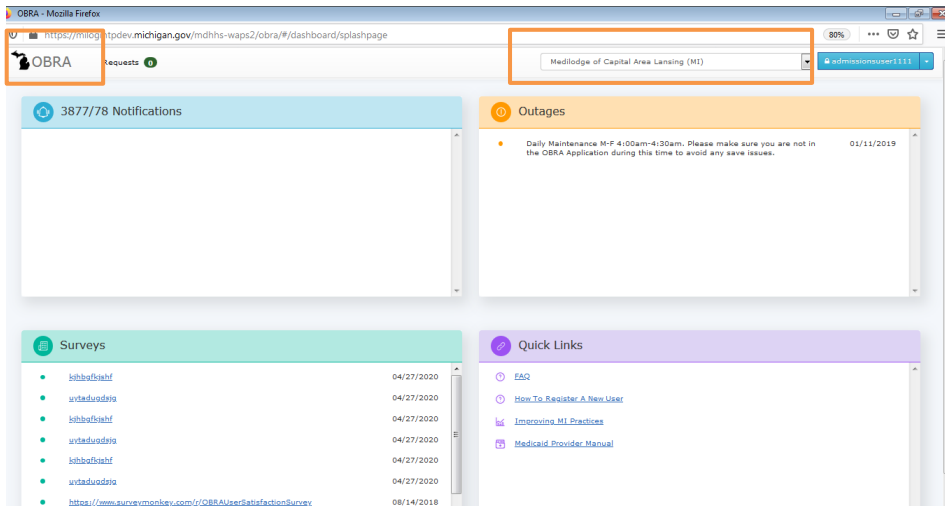
Upon click of "OBRA" link on the top left, dashboard page appears:
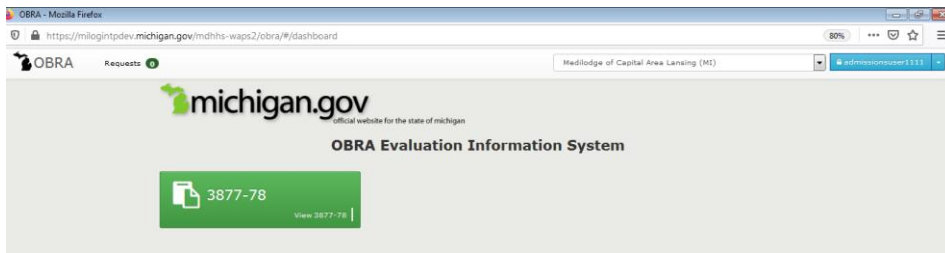
Facility Worker (Dashboard):
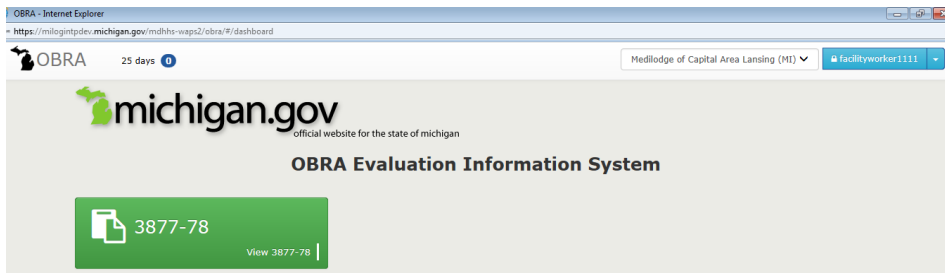
View Only (Dashboard):
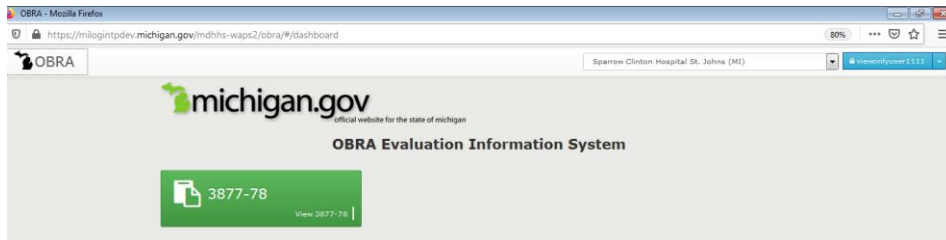
General Notes:

- Do not use the browser Refresh, Back, or Forward buttons throughout the application. Doing so can lead to unexpected behavior and the user may need to Logout and Login to the application.

- Likewise, depending on your window focus, using the Backspace button could lead to data loss. The problem occurs when you think your cursor is in a text field and it's not. If your window focus is in a text field, Backspace will move the cursor back a space as you would expect. If not, pressing this button will take you to the last URL you visited in that tab/window.

- When the user is logged in and doesn't perform any activity on the OBRA application for more than 15 minutes, the system will time out. We recommend logging out and logging

Consumers

Consumer Search

The functionality is under Consumers Module which is accessible only for the users with **role Role-3877.** Only CMH Coordinators and OBRA Staff can view this module and access Consumer Details.

After login, the user lands on **Splash** page, from which click on the OBRA link on the top left to land on the **Main Dashboard**. There, click the **Consumers** button. The screen below will be displayed.
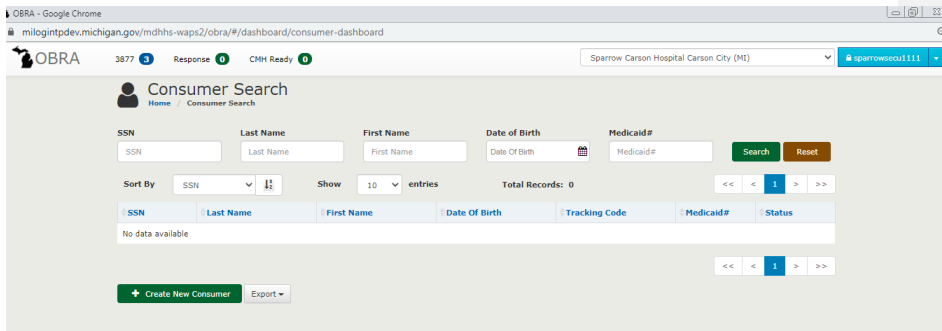
Enter a full SSN on the **Consumer Search** screen. Once a SSN is entered, click the **Search** button and the system will display the record generated based on the SSN entered as shown below.

Note:

- *The fields available for search will vary based on the permissions assigned to the user; e.g., most users will be able to search on only a full SSN. Because the SSN is a unique identifier for a Consumer, the search will return only exact matches.*

Clicking the record will display the **Consumer Detail** screen as shown below.
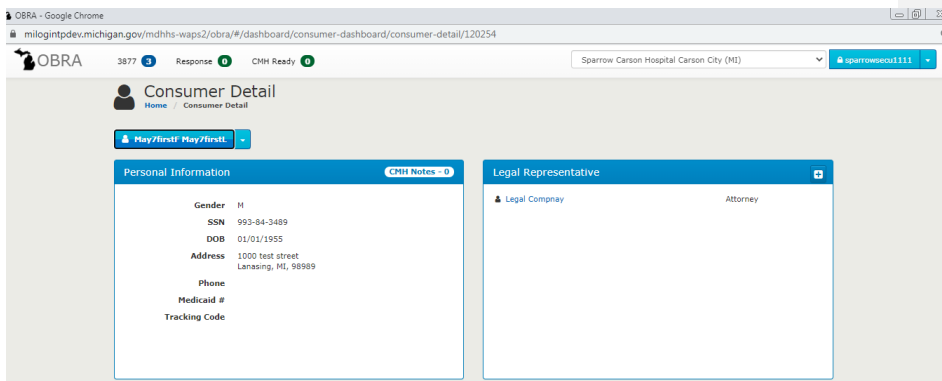
Explanation of Consumer Detail Screen
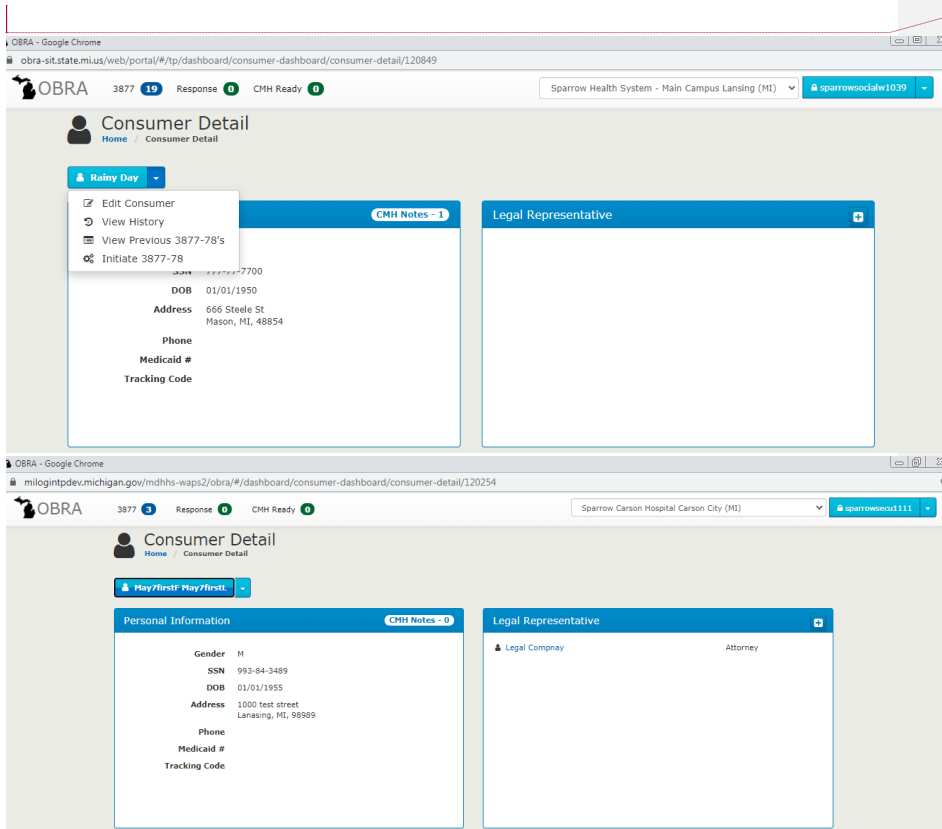
The **Consumer Detail** screen consists of the following sections:

- Personal Information
    - The Personal Information section consists of Consumer identifying and demographic information

- Legal Representatives
    - The Legal Representative section displays the Legal Representative associated to the Consumer

Accessing the Consumer Menu

Click the drop-down icon which is right after the Consumer name [▼] to expand the menu. Once clicked, the system will display the menu as shown below highlighted in orange.

*Note: The menu options displayed in the drop-down as shown above will vary based on the permissions assigned to the user; e.g., not all users will see the **"Initiate 3877-78"** option*

Action	3877 User	3878 User	Facility Admin	Facility Admissions	Facility Worker	View Only	CMH Staff	OBRA Staff
Edit Consumer	Y (for new consumers only)						Y	Y
View History	Y, but not Consumer Status history	Y, but not Consumer Status history	Y, but not Consumer Status history	Y, but not Consumer Status history	Y, but not Consumer Status history	Y, but not Consumer Status history	Y	Y
3877-78 Notes	Y	Y	Y	Y	Y	Y	Y	Y
Create New 3877-78	Y		Y					
Create New Evaluation							Y (till Mass Rollout)	
View Previous 3877-78's	Y	Y	Y	Y	Y	Y	Y	Y
Consumer Status and History	N	N	N	N	N	N	Y	Y

Consumer Actions

View Consumer History:

Once the **Consumer Menu** is expanded, click the **View History** menu option. The system will display the **Consumer History** screen as shown below.
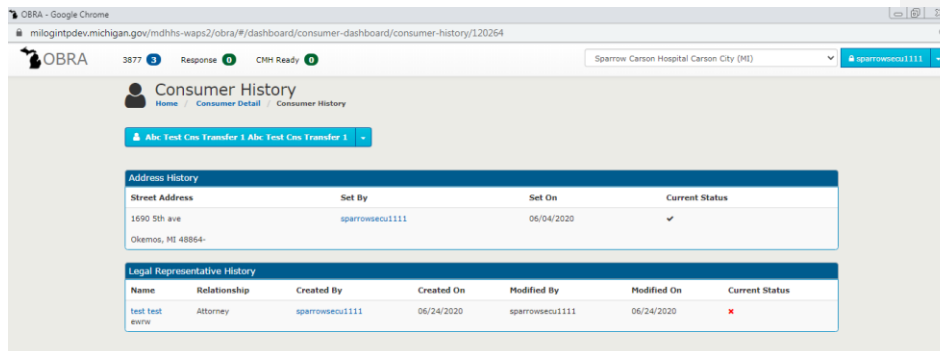
Explanation of Consumer History Screen

The **Consumer History** screen consists of the following sections:

- Address History
    - The Address History section consists of the changes related to the Consumer's address

- Legal Representative History
  - The Legal Representative History section displays the changes related to the Consumer's legal representation

Note:

- *To navigate back to the **Consumer Detail** screen, click the **Consumer Menu** button as shown above highlighted in red, click the **Consumer Detail** breadcrumb (hyperlink) as shown above highlighted in orange, or the user can expand the **Consumer Menu** and choose a relevant option.*

- *The user can also click the **Home** icon to navigate to the **Main Dashboard** as shown above highlighted in green.*

Create a New 3877-78 screening:

Once the **Consumer Menu** is expanded, click the "**Initiate New 3877-78**" menu option. The system will display the first screen for a new 3877-78.

View Previous 3877-78's:

Once the **Consumer Menu** is expanded, click the **View Previous 3877-78** menu option. The system will display the **3877-78 History** screen as shown below.
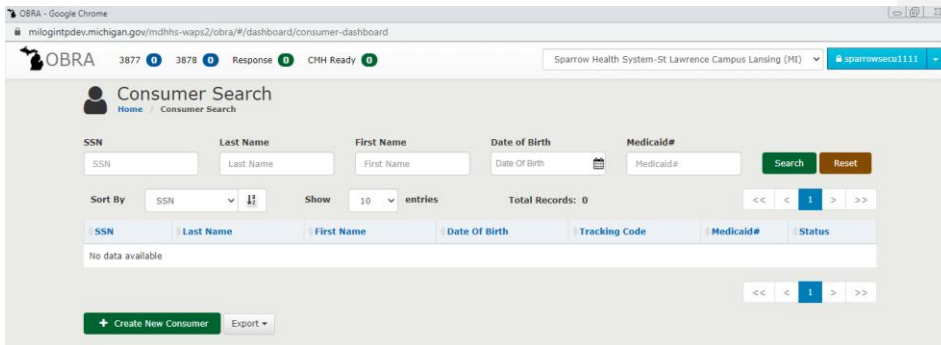
Note:

- *Only completed 3877-78 Screenings will be displayed*
- *Only a user who has access to a facility that owns the consumer i.e. where a Consumer's assigned facility can view previous 3877-78's. Other users cannot view previous screenings.*
- *CMH Coordinator also can view all previous 3877-78's when the Coordinator is performing Level-II for the consumer*
- *OBRA Staff can always view previous 3877-78's irrespective of the facility where Consumer is in*
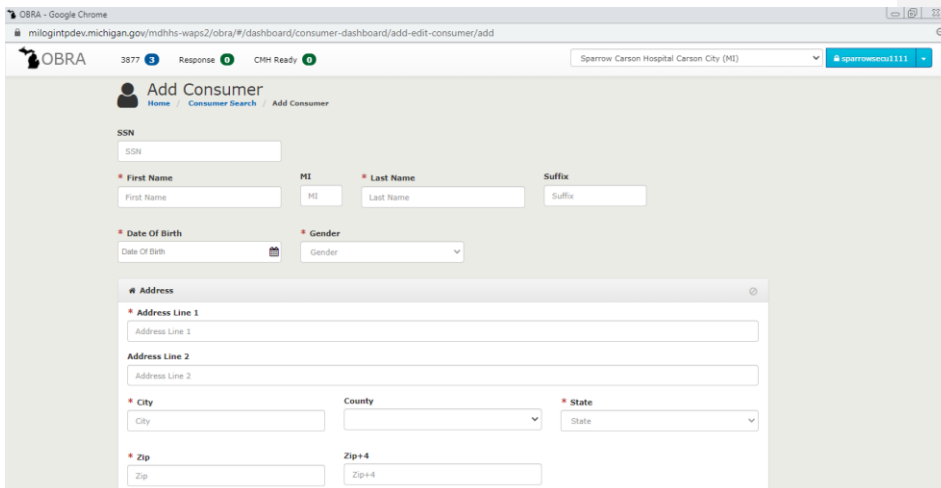
Create a New Consumer

From the **Main Dashboard**, click the **Consumers** button. The screen below will be displayed.

Click the **Create New Consumer** button. The screen below will be displayed.

Consumer Notes

Consumer Notes

Phone	Email
Phone	Email

Medicaid #	Tracking Code
Medicaid #	Tracking Code

Save   Reset   Cancel   Save and Create Legal Rep   Save and Initiate 3877-78

Fields that are suffixed with this icon [*] are required fields. Data must be entered in these fields.

When the user doesn't want to enter the Consumer's **Address** click this icon [⊘] and the system will not require the Address fields. Clicking this icon also hides the Address fields on the screen.
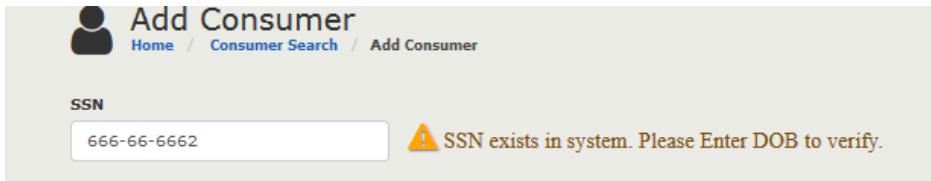
Clicking this icon [⊘] on Address will display all Address fields for the user to enter.

Note:

- *SSN is a required field. The system will display an alert message for the user to enter SSN number if they have one.*

- *Consumer Information Match with existing Database*
- *If SSN matches with that in Database,*
- *User would need to enter Date of Birth*
    - *If Date of Birth matches, then all the below information is auto populated*
        - *First Name*
        - *MI*
        - *Last Name*
        - *Suffix*
        - *Gender*
        - *Address*
    - *If Date of Birth does not match, then user cannot proceed further and would need to call the nearest CMH office.*
- *If SSN does not match with any in Database*
    - *User would enter all the demographic information i.e. First Name, MI, Last Name*
    - *System checks if the First Name and Last Name matches with any entry in the Database*

- If there is a match, then user will be prompted with a message "Consumer with the same name exists in the System. Please Enter DOB to verify."
- User enters DOB.
  - If DOB is matching then error message "Consumer with same name and DOB exists, please call Local CMH Coordinator"
  - If DOB is not matching then user can proceed with the rest of them
  - If there is no match, then user can proceed with the rest of the form
- When the user does not enter a SSN and enters all other data in the required fields and clicks Save, the system will display the following message and will not allow to proceed further without SSN.
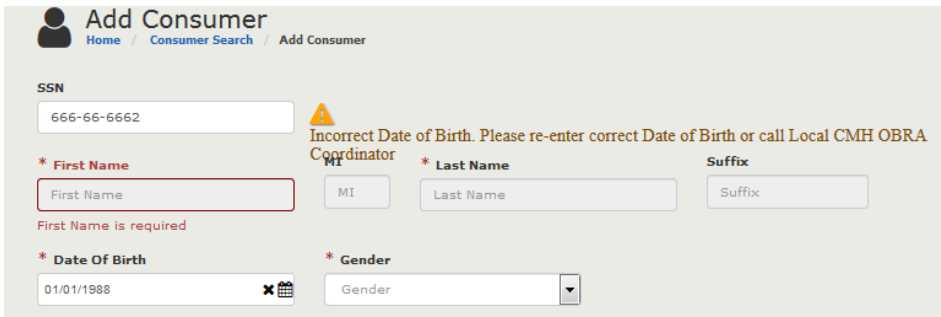
When SSN exists in the system:

SSN Matches, Incorrect date of birth entered:

SSN Matches, correct Date of Birth entered, other fields such as Name and Address auto populated:

SSN does not exist, but First Name and Last Name same as one in the database:

SSN does not exist, First & last Names same as one in the database, but same DOB given:

Validation Errors: When the user fails to enter any of the required fields, the system will display error messages to the user asking them to fill in the required field. The missing required fields will be highlighted in red for easy identification.

Once the user enters all required fields, click the **Save** button to create a new Consumer.

Button Functionality for Add Consumer

*Note: The buttons displayed at the bottom of the **Add Consumer** screen will vary based on the permissions assigned to the user; e.g., not all users will see the **Save and Create 3877-78** button.*
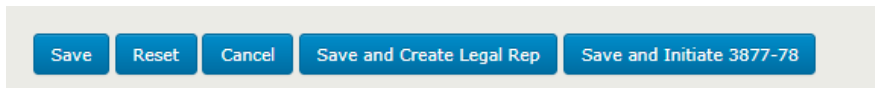
Reset: Clicking this button will clear the entered values.

Cancel: Clicking this button will return the user to the previous screen.

Save: Clicking this button will **Save** the entered values and display the **Consumer Detail** screen.

Save and Create Legal Rep: The system will perform two functions when the user clicks this button

    a) Create a New Consumer
    b) Display the **Add Legal Representative** screen

Save and Create 3877-78: The system will perform two functions when the user clicks this button

a) Create a New Consumer
b) Display the **Create 3877-78** screen

Legal Representative

Create a Legal Representative

The system offers three approaches to create a Legal Representative.

1. The user can create a Legal Representative from the **Add Consumer** screen. The user can choose to click the **Save and Create Legal Rep** button at the bottom of the **Add Consumer** screen.

2. The user can create a Legal Representative from the **Consumer Detail** screen by clicking this icon [icon] as shown below highlighted in orange.

3. The user can create a Legal Representative from the Section 1 of the 3877 Form by clicking on the '**Create Legal Rep'** button as shown below highlighted in orange.
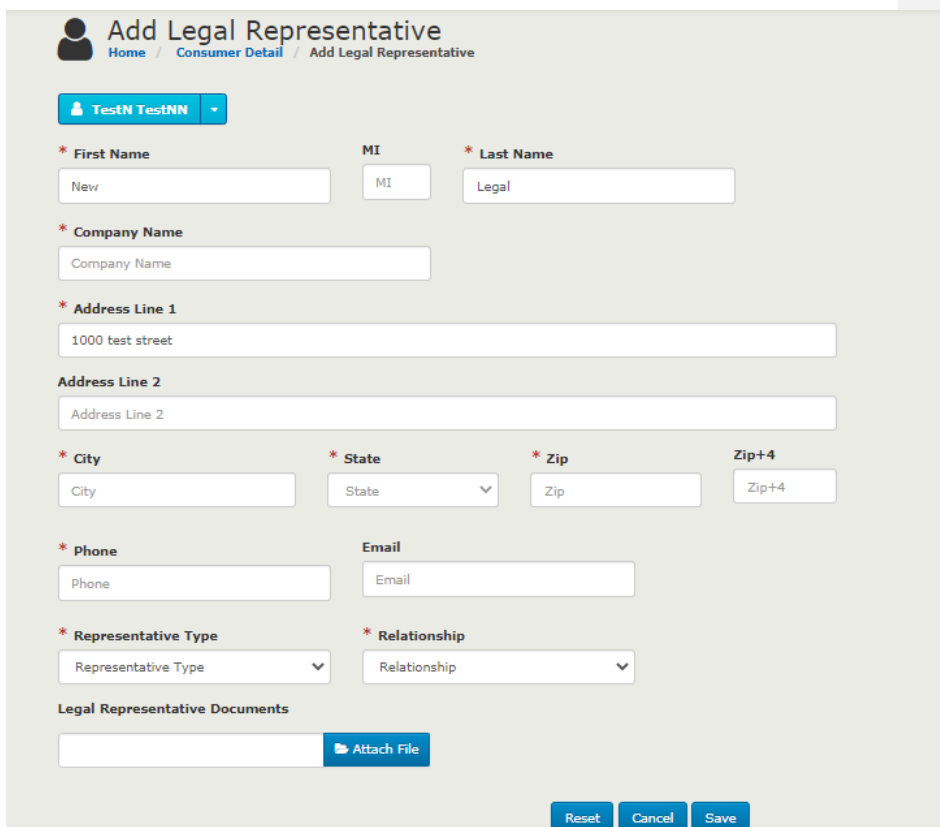
First Approach:

This is done at the same time a Consumer is added to the system.

- From the **Main Dashboard**, click the **Consumers** button. Click the **Create New Consumer** button. On the **Add Consumer** screen, fill in all required fields.
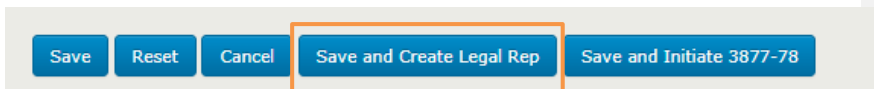
- Click the **Save and Create Legal Rep** button, the system will display the **Add Legal Representative** screen as shown below.

Steps:

- Enter data in all of the required fields. Please note that both the Frist Name and Last Name OR Company Name are required in order to save and create a Legal Representative.

- Attaching a file is not mandatory.
- System will allow any number of files to be uploaded
- Only file types PDF, .doc and .docx are to be uploaded
- After entering the data click the **Save** button to create the Legal Representative. Once saved, the system will display the **Consumer Detail** screen as shown below.
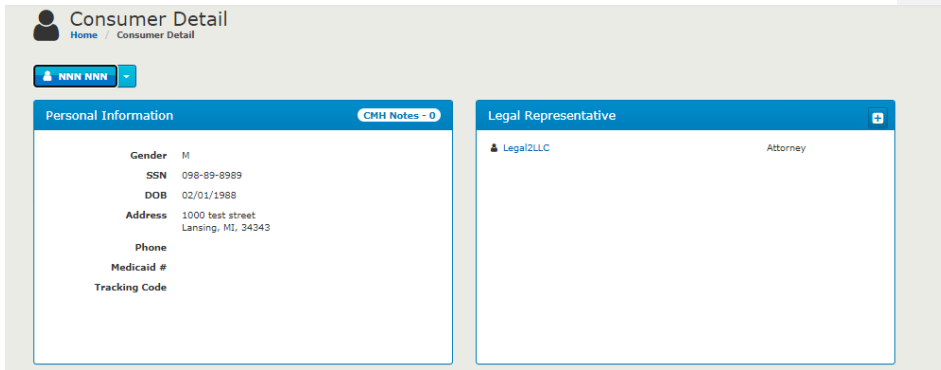
Second Approach:

This approach is used when the Consumer already exists in the system and you are adding or changing the Legal Representative.

- From the **Main Dashboard**, click the **Consumers** button. On the **Consumer Search** screen, search for the Consumer to which a Legal Representative needs to be associated.
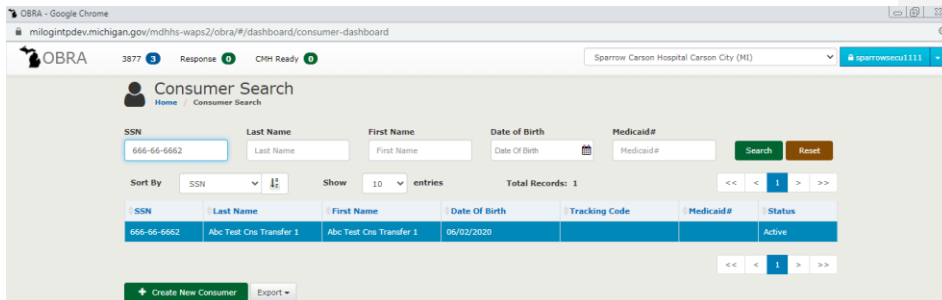
- Clicking the desired Consumer record will display the **Consumer Detail** screen.

- The user can create a Legal Representative from the **Consumer Detail** screen by clicking this icon as shown below highlighted in orange.
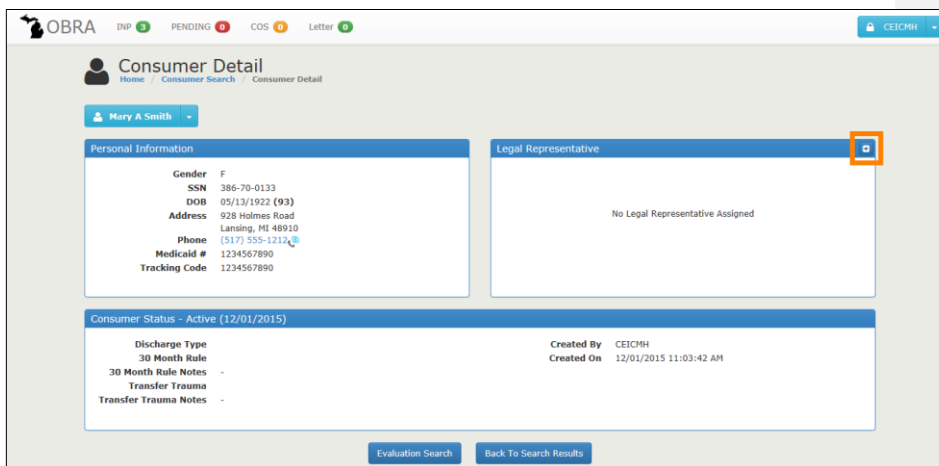
- The system will display the **Add Legal Representative** screen.

- Follow the steps as outlined earlier in the **First Approach** to Save a Legal Representative. But after save, it will land on the "**View Legal Representative**" screen with the documents uploaded on the bottom.

View Legal Representative
Home / Consumer Detail / View Legal Representative

Legal LLC ▾

Personal Information	
Company Name	Legal LLC
Address	1000 test street Lansing, MN, 34343 -
Phone	(212) 122-1212

Type & Audit	
Type	Attorney
Relationship	Activated DPOA
Created By	sparrowsecu1111
Created On	06/23/2020
Modified By	sparrowsecu1111
Modified On	06/23/2020

Documents Uploaded

- Doc Upload.docx

Third Approach:

This approach is used when the user wants to create a Legal Representative while filling out the 3877 Form.

- Initiate 3877-78 (the steps are given under 3877 Form)
- Land on Section 1

- *Click on the Create Legal Rep link on the bottom, highlighted in orange above*
- *System will navigate to the "**Add Legal Representative screen**" which is covered in the previous approaches*
- *Enter required details on the screen and click on "**Save**"*
- *System will navigate back to the 3877 Form Section 1*

Accessing the Legal Rep Menu

Once a Legal Rep is created it will be displayed on the **Consumer Detail** screen as shown below highlighted in orange.

The Name or Company Name of the Legal Rep will be a hyperlink as shown below highlighted in green.

Clicking the hyperlink will display the **View Legal Representative** screen as shown below.

Click the drop-down icon which is right after the Legal Rep name to expand the menu.

Once clicked, the system will display the **Legal Rep Menu** as shown below highlighted in orange.

Legal Rep Actions

Edit Legal Rep Details:

There are two approaches to this.

First Approach:

Once the **Legal Rep Menu** is expanded, click the **Edit Legal Rep** menu option. The system will display the **Edit Legal Representative** screen as shown below. The user can choose to edit the fields on this screen and save the changes by clicking the **Save** button.

*Note: The user can make necessary changes and can save the changes by clicking the **Save** button. Once saved, the system will display the **View Legal Representative** screen.*

Second Approach:

This approach is used when the user wants to edit the Legal Representative information at the time of filling the 3877 Form.

- Initiate 3877-78 (the steps are given under 3877 Form)
- Land on Section 1

- Click on the Create Legal Rep link on the bottom, highlighted in orange above
- System will navigate to the "**Edit Legal Representative screen**" which is covered in the previous approaches

- Enter required details on the screen and click on **"Save"**
- System will navigate back to the 3877 Form Section 1

View Legal Rep History:

Once the **Legal Rep Menu** is expanded, click the **View History** menu option. The system will display the **View Legal Rep History** screen as shown below.

Any edits (changes) to a Legal Rep's address is displayed under History. The **most recent** change is displayed at the top and is marked as **Active (a green color tick)** as shown below highlighted in orange.

Unlink Legal Rep from Consumer:

There are two approaches to doing this.

First Approach:

Once the **Legal Rep Menu** is expanded, click the **Unlink Consumer** menu option. The system will display the **Consumer Detail** screen as shown below.

Once a Legal Rep is unlinked, the system will no longer display any information about the unlinked Legal Representative in the Legal Representative section as shown below highlighted in orange.
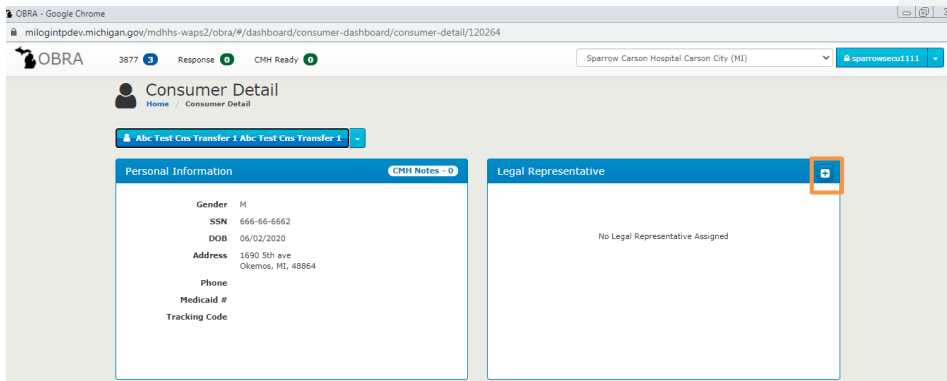
Second Approach:

This approach is used when the user wants to edit the Legal Representative information at the time of filling the 3877 Form.

- Initiate 3877-78 (the steps are given under 3877 Form)
- Land on Section 1
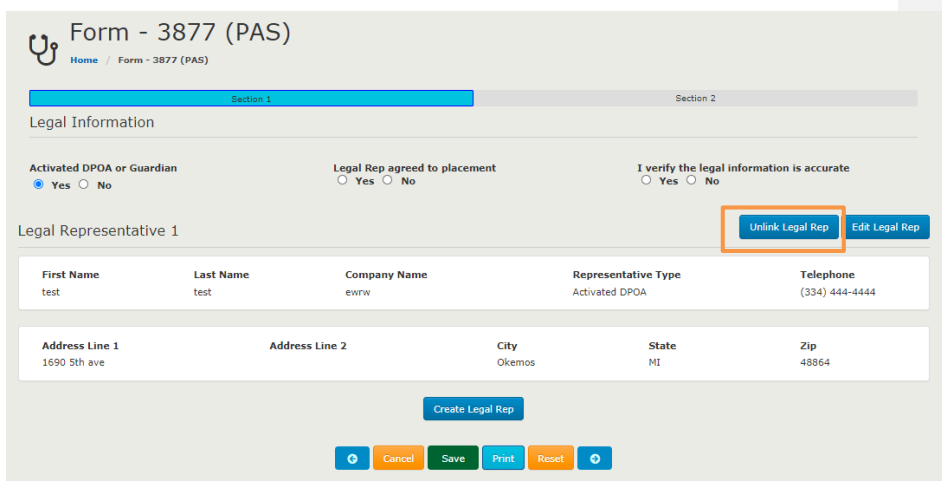
- Click on the Create Legal Rep link on the bottom, highlighted in orange above
- System will unlink the Legal Rep and display Legal Representative
- System will navigate back to the 3877 Form Section 1

Relink Consumer to Legal Rep:

In order to relink the Legal Rep to the Consumer again, the user can navigate to the **Consumer Menu** and click the **View History** menu option. The system will display the **Consumer History** screen as shown below.
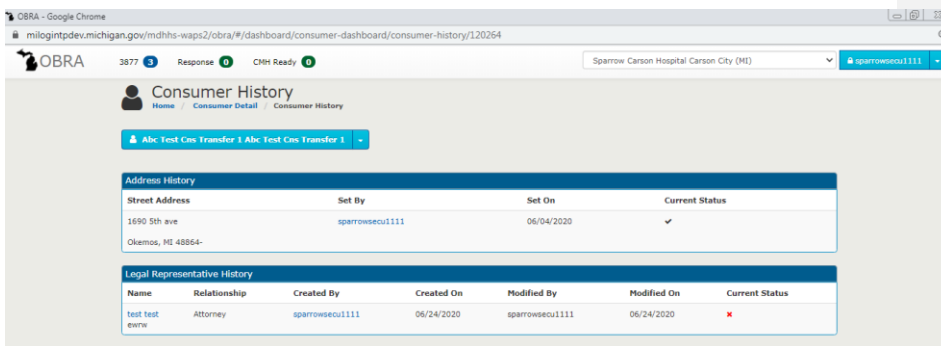
Clicking the **Legal Rep** name hyperlink as shown above highlighted in orange will display the **View Legal Representative** screen.

By expanding the **Legal Rep Menu** and clicking the **Link Consumer** menu option, the system will display the **Select Relationship Type** pop-up. The user can then select the appropriate relationship. After selecting the appropriate relationship, click the **Link** button as shown below highlighted in orange to establish the link back to the Consumer.
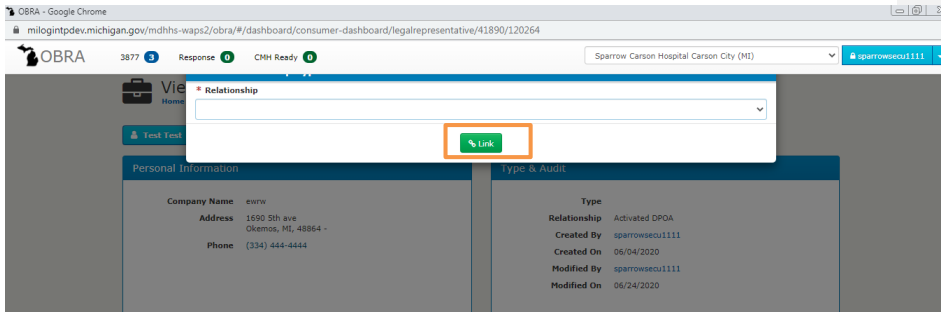
Consumer Actions

View Consumer Detail:

Once the **Legal Rep Menu** is expanded, click the **Consumer Detail** menu option. The system will display the **Consumer Detail** screen as shown below.

Consumer Actions

Edit Consumer Details:

Once the **Consumer Menu** is expanded, click the **Edit Consumer** menu option. The system will display the **Edit Consumer** screen. The user can choose to edit the fields on this screen and save the changes by clicking the **Save** button. **(refer to the Consumer section)**

- Note: This option is available only for Role-3877 until 3877 form is submitted

View Consumer History:

Once the **Consumer Menu** is expanded, click the **View History** menu option. The system will display the **Consumer History** screen where all of the changes related to Consumer Address, Legal Representative. **(Refer to the Consumer section)**

Initiate a New 3877-78:

Once the **Consumer Menu** is expanded, click the **Initiate New 3877-78** menu option. The system will display the first screen for a new 3877. **(refer to the Evaluation section)**

Note:

- *Only one screening can be in process for a Consumer at one time. The system will display an alert message for the user that the "Consumer has an open 3877-78. Cannot create a new one."*

Commented [DVVM3]: Need screenshot

View Previous 3877-78:

Once the **Consumer Menu** is expanded, click the **View Previous Evaluations** menu option. The system will display the **3877-78 History** screen as shown below.

Create a New 3877-78

Once the user with the role Role-3877 has logged into the OBRA application and clicked on the OBRA link on the top left of the Splash Page, the system will display the Role-3877 **Main Dashboard** as shown below.
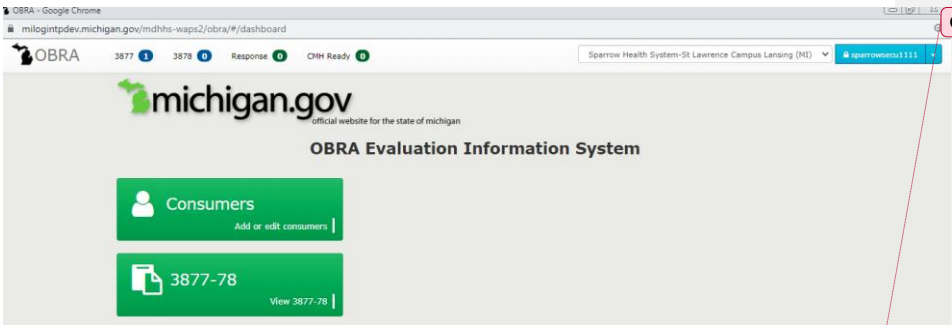
From the **Main Dashboard**, click the **Consumers** button. The screen below will be displayed.
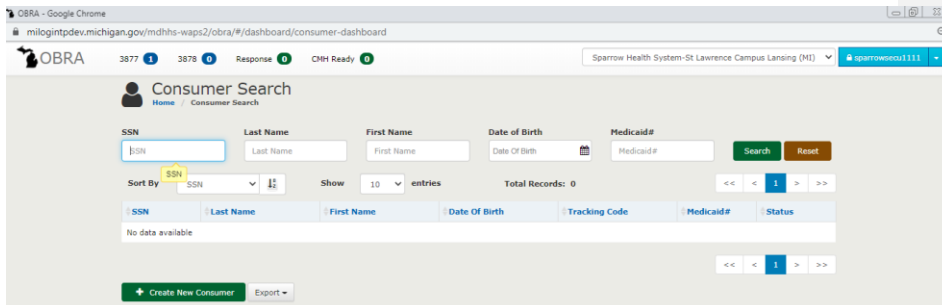
Search for a consumer by entering the complete SSN and clicking on the "Search" button. The consumer record will be displayed.

Click on the Consumer record and land on the Consumer detail page. Under the consumer name drop down, click on Initiate 3877-78
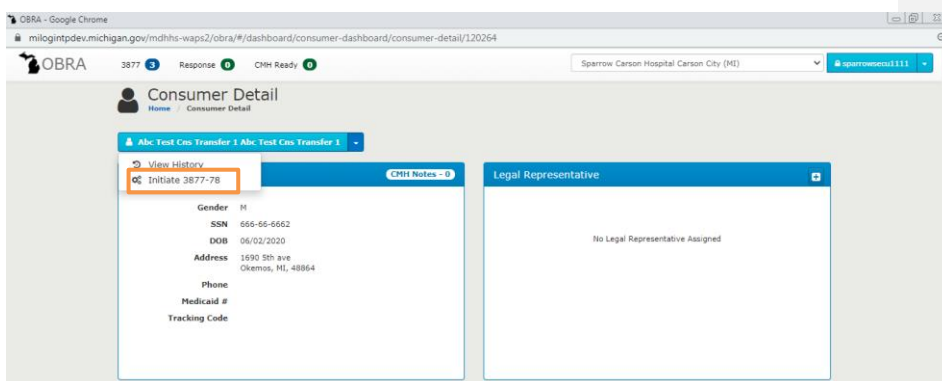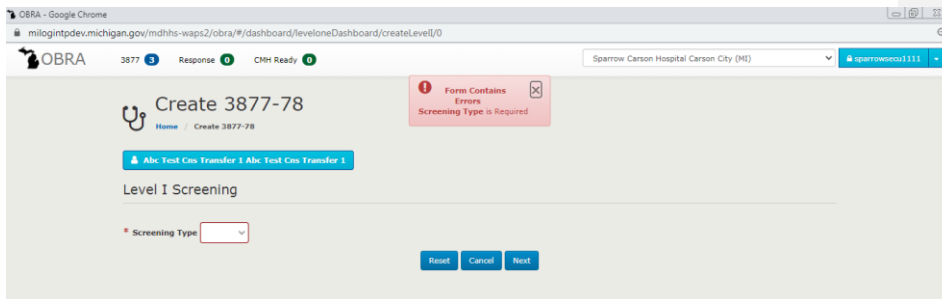
System navigates to the Create 3877-78 Screen

Create 3877-78 screen

Fields that are suffixed with this icon ⬚ are required fields. Data must be entered in these fields.

Validation Errors: When the user fails to enter the screening type, the system will display error messages to the user asking them to fill in the required field. The missing required field will be highlighted in red for easy identification.

Once the user enters the screening, click the **Next** button to move to the Section 1 of the 3877 Form.

Note:

- *The screening type on the drop down depends on where the user is located in. If the user is associated to a Hospital, the drop down will have only PAS. If the user is associated to a Nursing Facility, the drop down will have ARR and CIC.*
- *How to fill a 3877 Form- Entry Points:*
    - MI Login home page -> MDHHS OBRA -> 3877 Module -> Initiate 3877/78
    - Click on **Assigned** link from 3877 Queue to land on **In Progress** 3877
    - Click on **Assigned** link from 3877/78 Listing Page to land on **In Progress** 3877
    - Click on **3877** link on 3877/78 Detail screen to land on a **Completed** 3877
    - Click on **Completed** link on 3877/78 Listing screen to land on a **Completed** 3877
    - Click on **Rejected** link from 3877/78 Listing Page to land on a **Rejected** 3877

3877 Section 1:

Existing Legal Representative Information will be displayed as shown in the below screenshot highlighted in Orange.

- 3877 Section 1, i.e. Legal Representative section will contain the following information
    - Activated DPOA (Y/N)?
        - This question will be shown at the top
        - This option will be defaulted to NO when there are no Legal Representatives for the Consumer
            - If one or more Legal Representatives exist,
                - This option will be defaulted to YES when there are existing Legal Representatives prepopulated
                - **Edit Legal Rep** button takes the user to the Legal rep screen and user can navigate back to the form when the changes are done (already covered under Legal Representatives)

- Option to add new Legal Representative is given at the bottom of the Legal Representative section (already covered under Legal Representatives)
  - If Legal Representative does not exist
    - Default the "Activated DPOA (Y/N)?" to N
  - Legal Representative agreed to Placement?
    - When Yes is checked
      - User can enter rest of the information on the form
    - When No is checked
      - Message is displayed "Do you want to reject form?" with Reject header. If Yes is clicked, user is taken to the 3877 Queue and the form status is rejected
  - "I verify this Legal Information is accurate" with Yes and No Radio buttons
    - This question will be repeated for each Legal Representative
    - Mandatory question that needs to be answered

Legal Rep did not agree to placement – Warning message:
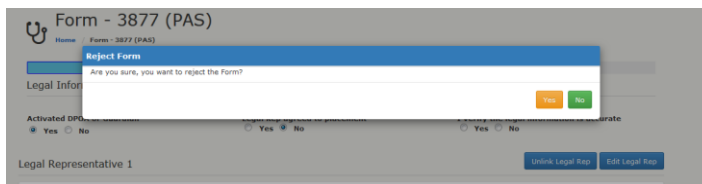
Button Functionality for 3877 and 3878 Forms:

Once the user with Role-3877 enters all required fields, he/she must certify the assessment form by marking the required box and then click the **Submit to Counter Signee** button or the **Submit to Coordinator** button. The system will **Save** the entered values and return the Qualified Professional (Assessor) to the **Assessor Landing Page** screen.

Back: Clicking this button will prompt the user about unsaved data and return the user to the previous screen.

Reset: Clicking this button will clear the entered values.

Save: Clicking this button will prompt the user about unsaved data and keep the user on the same screen.

Cancel: Clicking this button will prompt the user about unsaved data and return the user to the **3877-78 Search Page**.

Next: Clicking this button will prompt the user about unsaved data and navigate the user to the next screen.

Print: Clicking this button will display, in PDF format in a new browser tab/window, the 3877 Form.

Submit: Clicking this button submits the completed 3877 Form

Until 3877 Form is submitted, the **3877** Queue will have a record indicating that there is an in progress form. When the 3877 form is submitted, the **3877 queue** count reduces by 1.

3877 Section 2:

Form - 3877 (PAS)

Home / Form - 3877 (PAS)

Section 1	Section 2

Agency Information

* Referral Source

Sparrow Clinton Hospital - 805 S Oakland St, St. Johns - 48879

Telephone Number

9892273400

Admission date to nursing facility (proposed or actual)

Nursing Facility Name

County Name

CLINTON

* This section of form must be completed by a Registered Nurse, Licensed Bachelor or Master Social Worker, Licensed Professional Counselor, Psychologist, Physician's Assistant, Nurse Practitioner or a Physician

Screening Criteria (All 7 items must be completed.)

	Yes	No
1. The person has a current diagnosis of: Mental Illness ○ Dementia ○ Both	○	○
2. The person has received treatment for: Mental Illness ○ Dementia (within the past 24 months) ○ Both	○	○
3. The person has routinely received one or more prescribed antipsychotic or antidepressant medications within the last 14 days.	○	○
4. There is presenting evidence of mental illness or dementia including significant disturbances in thought, conduct, emotions, or judgment. Presenting evidence may include, but is not limited to, suicidal ideations, hallucinations, delusions, serious difficulty completing tasking, or serious difficulty interacting with others.	○	○
5. The person has a diagnosis of intellectual/developmental disability or a related condition, including but not limited to epilepsy, autism, or cerebral palsy, and this diagnosis manifested before the age of 22.	○	○
6. There is presenting evidence of deficits in intellectual functioning or adaptive behavior which suggests that the person may have intellectual/developmental disability or a related condition.	○	○
7. Qualifies for Exemption? (Coma, Dementia, Hospital Exempt Discharge)	○	○

If any 'yes', please explain:

Note:
The person screened shall be determined to require a comprehensive Level II OBRA evaluation if any of the above items are "Yes" UNLESS a physician, nurse practitioner or physician's assistant certifies on form DCH-3878 that the person meets at least one of the exemption criteria.

☐ **By checking this box, I certify to the best of my knowledge that the above information is accurate**

Name:
User Sparrowsec

Qualifications:
LMSW - Licensed Master Social Worker
LBSW - Licensed Bachelor Social Worker
LLBSW - Limited Licensed Bachelor Social Worker

Address:
805 S Oakland St
St. Johns 48879

AUTHORITY:
Title XIX of the Social Security Act.

COMPLETION:
Is voluntary, however, if NOT completed, Medicaid will not reimburse the nursing facility

The Michigan Department of Health and Human Services (MDHHS) does not discriminate against any individual or group because of race, religion, age, national origin, color, height, weight, marital status, genetic information, sex, sexual orientation, gender identity or expression, political beliefs or disability.

DISTRIBUTION:
If any answer to items 1-6 in SECTION II is "Yes", send ONE copy to the local Community Mental Health Services Program (CMHSP) with a copy of form DCH-3878 if an exemption is requested. The nursing facility must retain the original in the patient record and provide a copy to the patient or legal representative

[Cancel] [Save] [Print] [Reset] [Submit]

Fields that are suffixed with this icon [*] are required fields. Data must be entered in these fields.

Validation Errors: When the user fails to enter any of the required fields, the system will display error messages to the user asking them to fill in the required field. The missing required fields will be highlighted in red for easy identification.
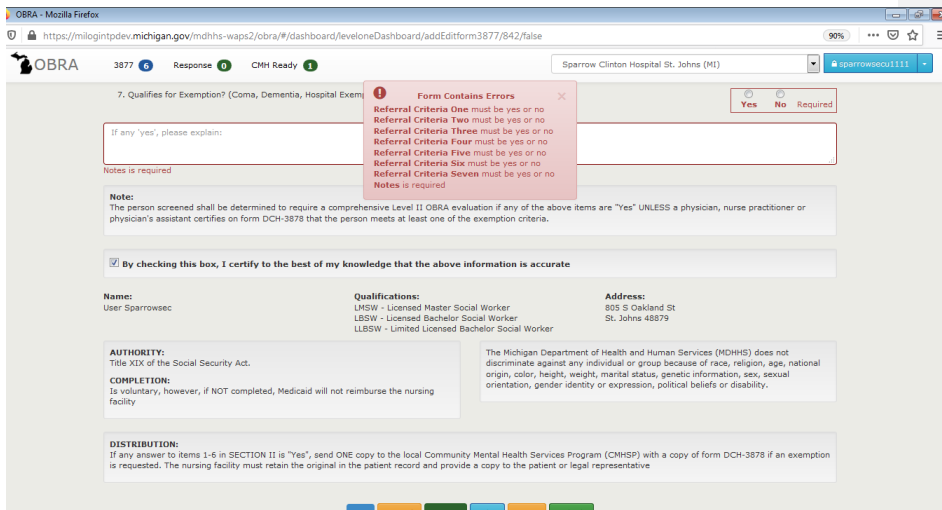
Once the user enters all required fields, click the **Submit** button to complete the 3877 Form. Upon submit, a printed PDF of the form will be displayed in a new window.

Note:

- *Agency Information on Section 1:*
    - *The Telephone Number, County Name and Facility Address are auto populated based on the Referring Agency Name*
- *Section 2: Signature:*
    - *The signature section is auto populated with the user that is filling / editing the form at that point in time*
    - *The signature section has the following information:*
        - *Name*
            - *Name of the user*
        - *Degree/License*
            - *Degree/License of the user*
        - *Address*
            - *Address of the facility where the user is filling the form from*
- *On Submission, Digital Signature is mandatory*

Land on 3877 Form from 3877 Queue

The user also can land on the 3877 form by clicking on

- **Assigned** for in progress records
- **Rejected** for Rejected records

Land on 3877 Form from 3877-78 Search module

Click on the 3877-78 Module

User lands on 3877-78 Search.
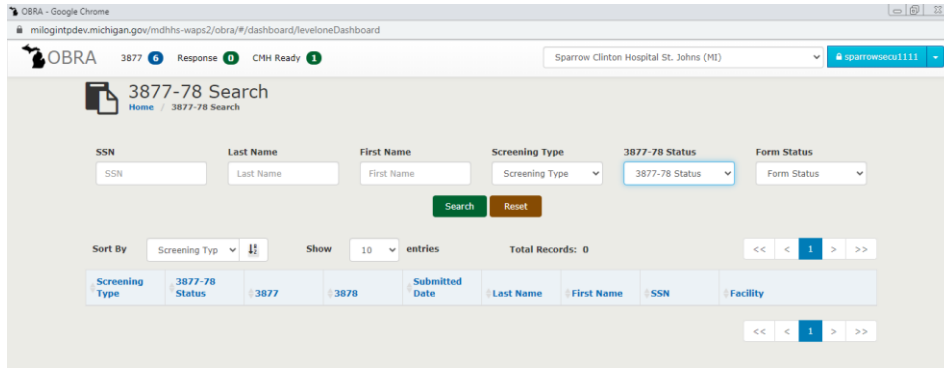
Select appropriate value (multi select) from the Form Status dropdown and click on Search

Screening Type	3877-78 Status	3877	3878	Submitted Date	Last Name	First Name	SSN	Facility
PAS	In Progress	Assigned		04/30/2020	xyz1	abcde	123-12-1234	
PAS	In Progress	Assigned		06/24/2020	Doe	John	999-09-9999	
PAS	In Progress	Assigned		04/28/2020	SecondNewL	SecondNewF	112-32-2222	
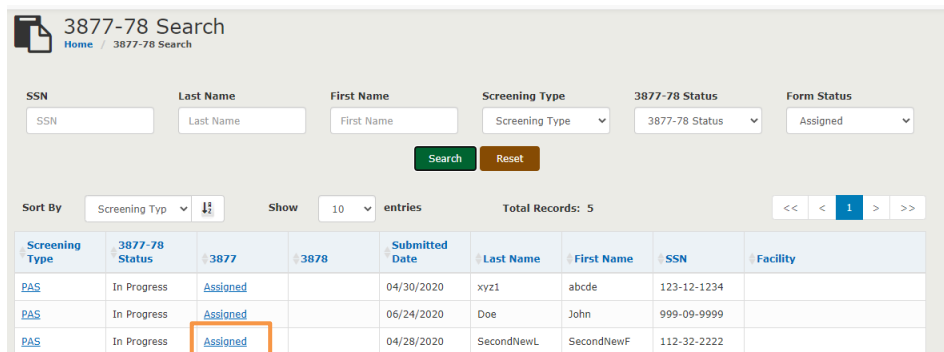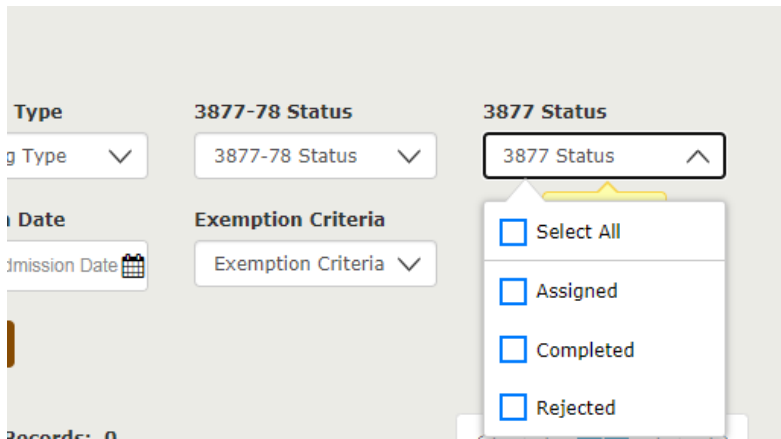
3878 Form

3878 Form is generated when answer to the 7th Question from the 3877 Referral Criteria is marked as "YES".

- A user can navigate to the 3878 Form in the following ways:
  MI Login home page -> MDHHS OBRA -> 3878 Module -> 3878 Link
- MI Login home page -> MDHHS OBRA -> 3878 Queue -> click on Form Status
- Click on **Assigned** link from 3878 Queue for **In Progress** 3878 Form
- Click on **Assigned** link from 3877/78 Listing Page for **In Progress** 3878 Form
- Click on **3878** link on 3878/78 Detail screen for a **completed** 3878 Form
- Click on **Completed** link on 3877/78 Listing screen for a **completed** 3878 Form
- Rejected 3878-> Click on **Rejected** link from 3877/78 Listing Page for a Rejected 3878 Form

3878 Section 1

Section 1 should be auto populated from 3877 Form
- Patient Information
- Agency Information

3878 Section 2

User clicks on Section 2 or clicks on "->" arrow from Section 1.

Form - 3878 (PAS)

Home / Form - 3878 (PAS)

Section 1	Section 2

* Exemption Criteria   ○ Coma   ○ Dementia   ○ Hospital Exempted Discharge (HED)

☐ By checking this box, I certify to the best of my knowledge that the above information is accurate

Printed Name: **Date:**
User DoctorSparrow   Jun 25, 2020

AUTHORITY:
Title XIX of the Social Security Act.

COMPLETION:
Is voluntary, however, if NOT completed, Medicaid will not reimburse the nursing facility

The Michigan Department of Health and Human Services (MDHHS) does not discriminate against any individual or group because of race, religion, age, national origin, color, height, weight, marital status, genetic information, sex, sexual orientation, gender identity or expression, political beliefs or disability.

COPY DISTRIBUTION:
    ORIGINAL - Nursing Facility retains in Patient file
    COPY - Attach to form DCH-3877 and send to Local Community Mental Health Services Program (CMHSP)
    COPY - Patient Copy or Legal Representative

[⊙] [Reset] [Save] [Print] [Cancel] [Reject] [Submit]

User selects **Coma**

Question is defaulted to Yes.

Section 1	Section 2

* Exemption Criteria   ● Coma   ○ Dementia   ○ Hospital Exempted Discharge (HED)

COMA:

○ No   ● Yes   I certify the patient under consideration is in a coma/persistent vegetative state

Sign and Submit the form to 3877 User.

☐ By checking this box, I certify to the best of my knowledge that the above information is accurate

Printed Name: **Date:**
User DoctorSparrow   Jun 25, 2020

AUTHORITY:
Title XIX of the Social Security Act.

COMPLETION:
Is voluntary, however, if NOT completed, Medicaid will not reimburse the nursing facility

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COPY DISTRIBUTION:
    ORIGINAL - Nursing Facility retains in Patient file
    COPY - Attach to form DCH-3877 and send to Local Community Mental Health Services Program (CMHSP)
    COPY - Patient Copy or Legal Representative

[⊙] [Reset] [Save] [Print] [Cancel] [Reject] [Submit]

User selects Dementia and answers **YES** to all questions that trigger enabling next question.

Section 1	Section 2

* Exemption Criteria ○ Coma ◉ Dementia ○ Hospital Exempted Discharge (HED)

DEMENTIA:

○ ◉
No Yes   I certify the patient under consideration does not have an intellectual disability, developmental disability or a related condition

○ ◉
No Yes   I certify the patient under consideration does not have another primary psychiatric diagnosis of a serious mental illness

○ ◉
No Yes   I certify the patient under consideration has dementia as established by clinical examination and evidence of meeting ALL 5 criteria below

Specify the type of dementia ⊙

Type Of Dementia

Alzheimer's Type
Vascular Dementia
Other General Medical Conditions
Substance - Induced Persisting Dementia
Not Otherwise Specified

○ ○   ...term or long-term memory as indicated by the ability to learn new information or remember
No Yes   ...remember past personal information or facts of common knowledge.

○ ○   ...t apply)
No Yes   ...e inability to find similarities and differences between related words; has difficulty defining
             ○ Yes ○ No
             * Impaired judgment, as indicated by inability to make reasonable plans to deal with interpersonal, family and job-related issues.
             ○ Yes ○ No
             * Other disturbances of higher cortical function, i.e., aphasia, apraxia and constructional difficulty
             ○ Yes ○ No

             * Personality change: altered or accentuated premorbid traits.
             ○ Yes ◉ No

○ ◉   3. Disturbances in items 1 or 2 above significantly interfere with work, usual
No Yes   activities or relationships with others.

○ ◉   4. EITHER:
No Yes
             a) Medical history, physical exam and/or lab tests show evidence of a specific organic factor judged to be etiologically related to the disturbance,
             OR
             ◉ Yes ○ No
             b) An etiologic organic factor is presumed in the absence of such evidence if the disturbance cannot be accounted for by any non-organic mental
             disorder.
             ○ Yes ○ No

Sign and Submit the form to 3877 User.

☐ By checking this box, I certify to the best of my knowledge that the above information is accurate

Printed Name:	Date:
User DoctorSparrow	Jun 25, 2020

AUTHORITY:
Title XIX of the Social Security Act.

COMPLETION:
Is voluntary, however, if NOT completed, Medicaid will not reimburse the nursing facility

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COPY DISTRIBUTION:
ORIGINAL - Nursing Facility retains in Patient file
COPY - Attach to form DCH-3877 and send to Local Community Mental Health Services Program (CMHSP)
COPY - Patient Copy or Legal Representative

[⊕] [Reset] [Save] [Print] [Cancel] [Reject] [Submit]

Note: If User selects Dementia
- *Only Dementia section appears*
- *If answer to Question 1 in Dementia is Yes, proceed to Question 2*
- *If answer to Question 3 in Dementia is Yes, proceed to sub section under Dementia to describe the type of Dementia and further questions related to Dementia*

- *If answer to Questions 3 or 4 within the subsection is No, then Reject option appears with a box to enter the comments*

User selects **HED** – This option is available only to certain Facility types e.g. Hospitals that initiate only PAS screening.

Note:

- There will be message to the user "Screening type will be changed to HED" to communicate that once the user submits the form, the screening type will be changed
- If answer to any of the questions in the HED section is No, then Reject option appears with a box to enter the comments

Rejecting a 3878 and 3877 Form

The 3878 user can reject the screening for various reasons. In order to reject a Coma or a Dementia or HED, user can select No to any question according to the rules given under each screenshot in the previous section. Then the following Reject text box appears.

Enter the text under the box shown above and click on **Reject**.

Error messages during submission

The below table shows the error messages that user can face during submission

Error	Screen/Section	Scenario	Error Message
1	Section 2 – Dementia	When enabled, Question 2 is not Selected	DEMENTIA Criteria 2 must be answered
2	Section 2 – Dementia	When enabled, Question 2 is Yes, Question 3 is not Selected	DEMENTIA Criteria 3 must be answered
3	Section 2 – Dementia	When enabled, Question 1 and 2 are Yes, Question 3 is not Selected	Dementia Question Three should be Yes or No
4	Section 2 – Type of Dementia	Type of Dementia dropdown not selected	Type of Dementia must be answered
5	Section 2 – Type of Dementia	When enabled, Question 1 under Type of Dementia not selected	Type of Dementia Question 1 must be answered
6	Section 2 – Type of Dementia	When enabled, Question 2 under Type of Dementia not selected	Type of Dementia Question 2 must be answered
7	Section 2 – Type of Dementia	When enabled, Question 2 under Type of Dementia is selected, at least one of four questions is not answered	Type of Dementia Question 2 at least one category must be answered
8	Section 2 – Type of Dementia	When enabled, Question 3 under Type of Dementia not selected	Type of Dementia Question 3 must be answered
9	Section 2 – Type of Dementia	When enabled, Question 4 under Type of Dementia not selected	Type of Dementia Question 4 must be answered
10	Section 2 – Type of Dementia	When enabled, Question 4 under Type of Dementia is selected, at least one of the Two questions is not answered	Type of Dementia Question 4 category is required
11	Section 2 – Hospital Exempt Discharge	When enabled, Question 2 under HED not selected	HED Criteria 2 must be answered
12	Section 2 – Hospital Exempt Discharge	When enabled, Question 3 under HED not selected	HED Criteria 3 must be answered
13	Section 2	Digital signature box not selected while trying to submit	Digital Signature is Required

Once the Qualified Professional (Assessor) has logged into the OBRA application, the system will display the **Assessor Landing Page**; a list of assessment forms that have been assigned as shown below.

Note:

- On Submission, checking the Digital Signature box is mandatory
- **3878 Status:**
  - Upon rejection, the 3878 and 3877 statuses will be "Rejected"
  - Upon successful submit, the 3878 status will be "Completed"
- **Save:** Save the data but stays on the page
- At any point in time user wants to exit out of the form,
  - Click on the OBRA Dashboard link on top left
  - Click on any of the queues on top right

3877 User working on a Rejected Form

Once the 3878 User rejects the form, the **Role-3877** User sees the record in the 3877 Queue

Click on **Rejected** link under the status column.

User will land on the 3877 Record. Navigate to Section 2. Rejection comments will be visible at the bottom.

Form - 3877 (PAS)

Home / Form - 3877 (PAS)

Section 1	Section 2

Agency Information

* Referral Source

Sparrow Clinton Hospital - 805 S Oakland St, St. Johns - 48879

Telephone Number

9892273400

Admission date to nursing facility (proposed or actual)

Nursing Facility Name

Cambridge North Healthcare Center - 535 N Main, Clawson, OAKLAND - 48017

County Name

CLINTON

Rejection Comment

3878 required

Note:
The person screened shall be determined to require a comprehensive Level II OBRA evaluation if any of the above items are "Yes" UNLESS a physician, nurse practitioner or physician's assistant certifies on form DCH-3878 that the person meets at least one of the exemption criteria.

☐ By checking this box, I certify to the best of my knowledge that the above information is accurate

Name:	**Qualifications:**	**Address:**
User Sparrowsec	LMSW - Licensed Master Social Worker LBSW - Licensed Bachelor Social Worker LLBSW - Limited Licensed Bachelor Social Worker	805 S Oakland St St. Johns 48879

AUTHORITY:
Title XIX of the Social Security Act.

COMPLETION:
Is voluntary, however, if NOT completed, Medicaid will not reimburse the nursing facility

The Michigan Department of Health and Human Services (MDHHS) does not discriminate against any individual or group because of race, religion, age, national origin, color, height, weight, marital status, genetic information, sex, sexual orientation, gender identity or expression, political beliefs or disability.

3877-78 Search

From the main dashboard, click the **3877-78** button. The screen below will be displayed.

Search screen. Once criteria are entered, click the **Search** button and the system will display the records generated based on the criteria entered as shown below.

Note: The records returned will vary based on the permissions assigned to the user; e.g., a user with View Only permissions can only view Screenings with Completed forms.

On the Module, select the filter "Waiting for NF" on the Search filter as shown below.
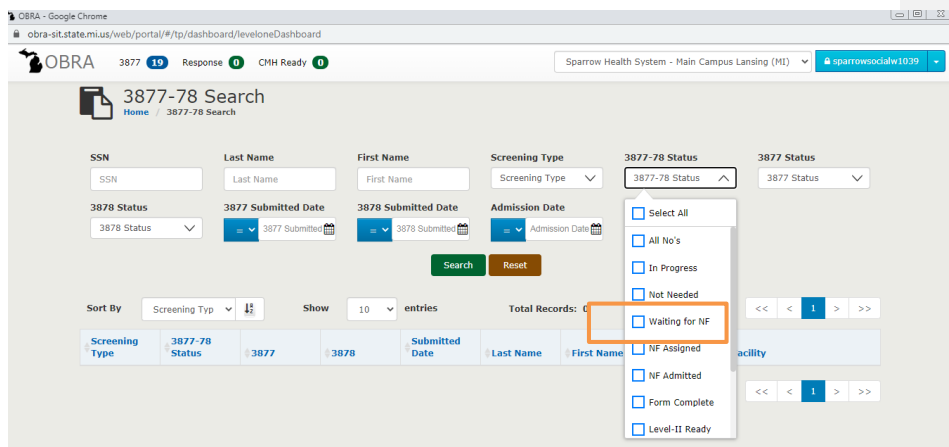
Search result:
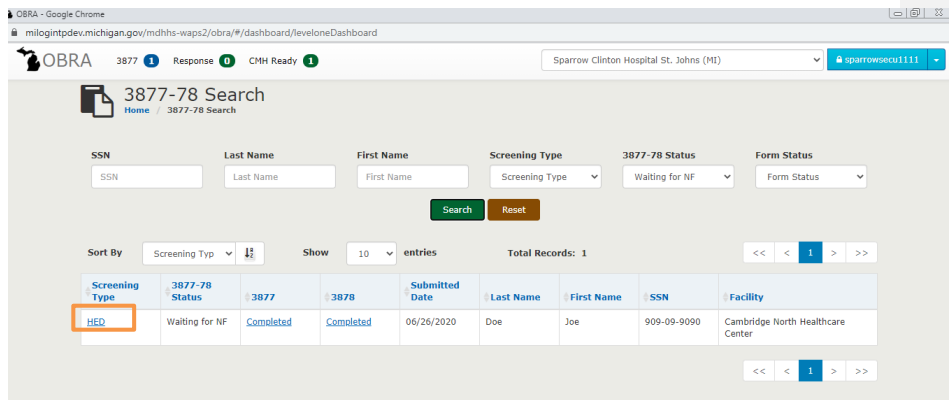
Process flow for HED Case:

Step 1 – Land on the 3877-78 Detail page:

Once the 3878 is completed by the user with **Role-3878** with HED option, the **Role-3877** User has to go to the dashboard and click on the 3877-78 Module

On the Module, select the filter "Waiting for NF" on the Search filter as shown below.

Search result:

Step 2 – Send Consumer Admission request to single or multiple facilities:

Click on the **HED** link above. System navigates to the 3877-78 Detail Page. Please note that the status of the screening would read "Waiting for NF".

Scroll down to the Facility Assignment section.
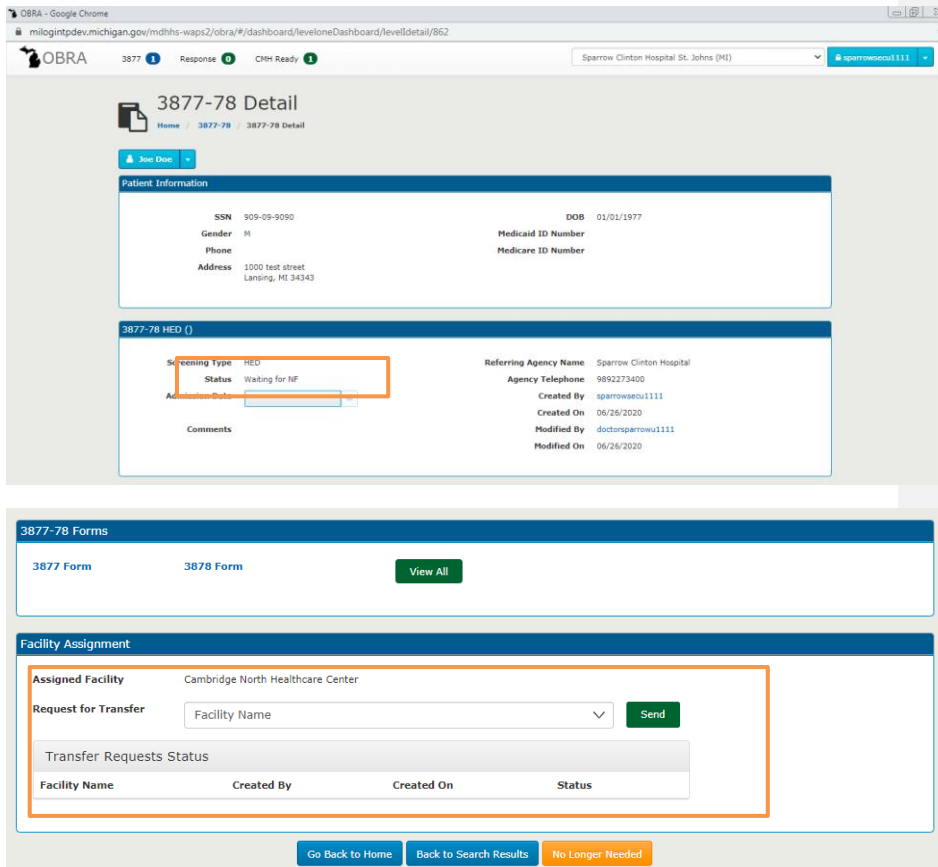
Request for Transfer will be a multi select dropdown with all active Nursing Facilities in the list. The user can select them and send upon one single click, the request will be sent to all the selected facilities.

*Note: The **Assigned Facility** shown at this point is the facility that was selected in the 3877 form.*

Once the dropdown for Facility name is clicked, it shows all the facilities with a multi select options. User can also type the first few characters and it will bring up the facilities matching up.

For example, in the below screenshot, user has typed **Medilo**

Select single or multiple facilities from this list and click on **Send** button.

Once the **Send** is performed, the following events will happen:

1. The **Facility Assignment** section will show the status of the requests.

The following are the values possible for the **Status** column.

- P-> Pending
- A-> Accepted
- D->Denied

The status will be **P** as soon as the **send** button is clicked.

2. The **Response** queue will be populated with 1 record
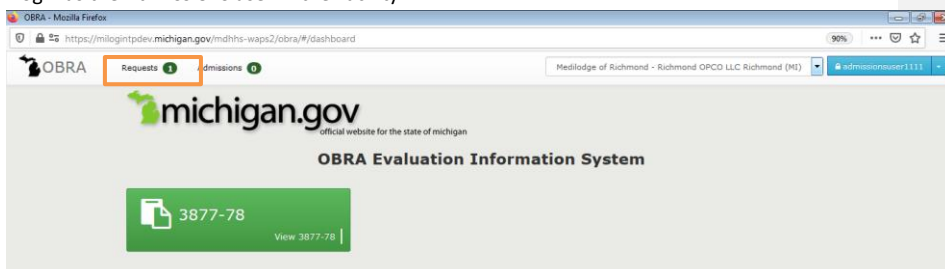

Click on the **Response** queue:

In the above screenshot, it denotes that there are 2 requests that were sent and in Pending status, 0 in Approved status – meaning that no facility has accepted the request to admit the Consumer and 0 in Denied status – meaning that no facility has denied the request to admit the Consumer.

Each of the facilities to which the request were sent will have a record in their **Request** queue as shown below.

This is shown to the **Admissions** user in the Facility.

Step 3 – Accepting/Denying the request:

 Login as the **Admissions** user in the Facility.

Click on the **Request** queue. It will show the record which has the Consumer details and the screening type. Click on the screening type to view the 3877-78 Detail Page. If the Facility is ready to accept the Consumer, click the **Approve** button. There will be a Yes/No confirmation pop up message that will appear and click on **Yes**.
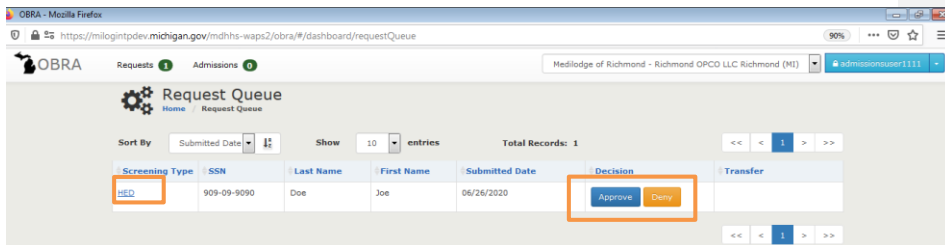

Once the approve button is clicked, the following events happen:

1. The record goes away from the Request queue
2. When a Role-3877 User (who originally sent the request to the facility) logs in and views the **Response** Queue, under the Facility Assignment section, the count of **Approved** will increase by 1 and count of **Pending** will decrease by 1
3. When a Role-3877 User (who originally sent the request to the facility) logs in and views the Detail page, under the Facility Assignment section, the status will change to A and an Assign button will appear.
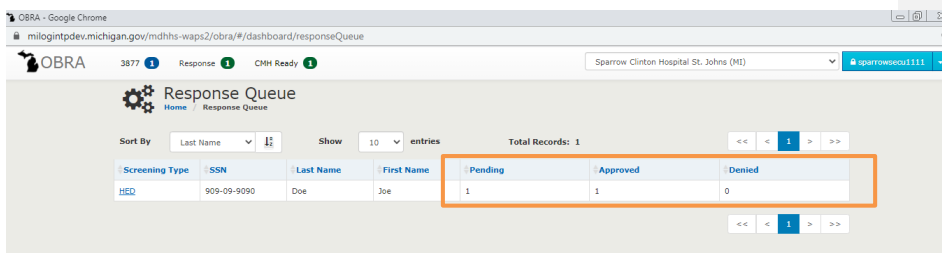
Screenshots given below:

Approve the record in the Request queue:
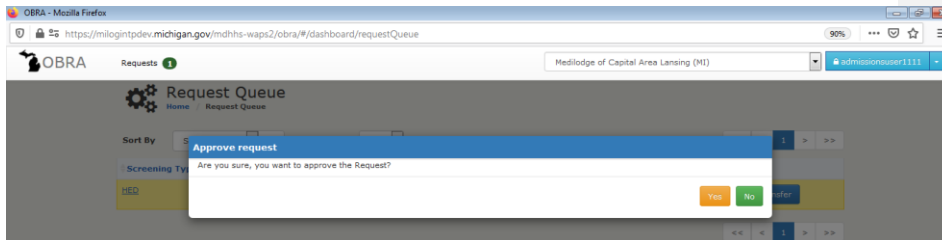
Step-4- Assigning a Facility:

The Role-3877 user from the Hospital views the Response queue:

Note: if the request was denied, the **Denied** count will be increased by 1.

As a Role-3877 Hospital user, click on the HED Link on the screening type and land on the 3877-78 Detail screen. Scroll down to the Facility Assignment section. As soon as one facility has accepted the request, the Assign button appears next to the request. The hospital user can click on Assign button which would mean that the Consumer will be admitted to this facility. Please refer the screenshot below.

Click on the **Assign** button. The Assigned facility will change to the Facility next to which Assign was performed. There will also be an **Unassign** button next to this facility. The status of the Screening also will be changed to **NF Assigned**

Clicking on **Unassign** button will remove the facility name from the **Assigned facility** label. The Hospital user can select another facility to assign the Facility.

Step-5: Admitting a Consumer:

The next step is for the **Admissions user** in the Facility to admit the Consumer. When the Hospital user has clicked on the Assign button, a record will appear on the **Admissions queue** of the Facility Admissions user. Click on the Screening type and land on the 3877-78 Detail Page.
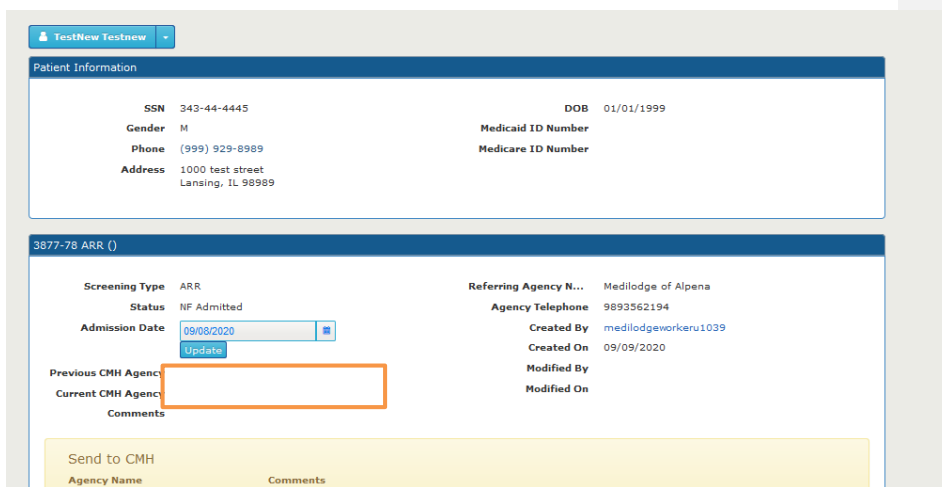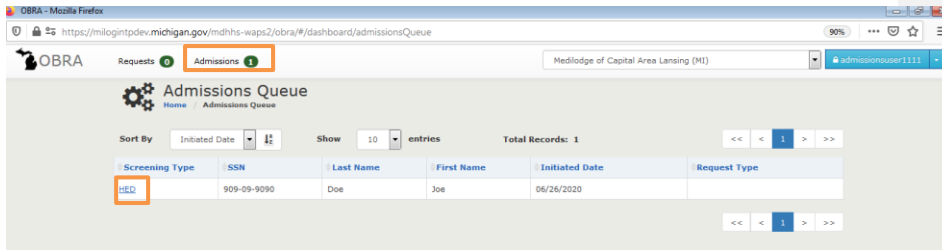
Select **Admission date** (System will allow any date up to current date) and click on **Update** button. Status of the screening will change to **NF Admitted**.
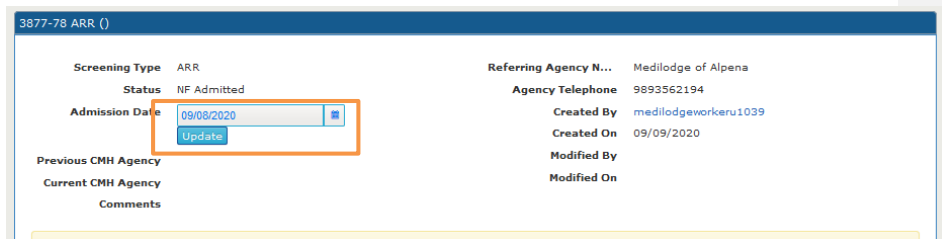
Step-6: 25 Day queue and Send to CMH/Expired/Discharged

This is to be performed by the user with role as **Facility Worker.**

As a Facility Worker, log in to OBRA. There are two approaches here.

First approach:

If the Facility has decided on what the next step is for, from a screening perspective is, i.e. whether to send this 3877-78 to CMH for a possible Level II, Discharge the patient, click on the 3877-78 module and search for the Consumer.
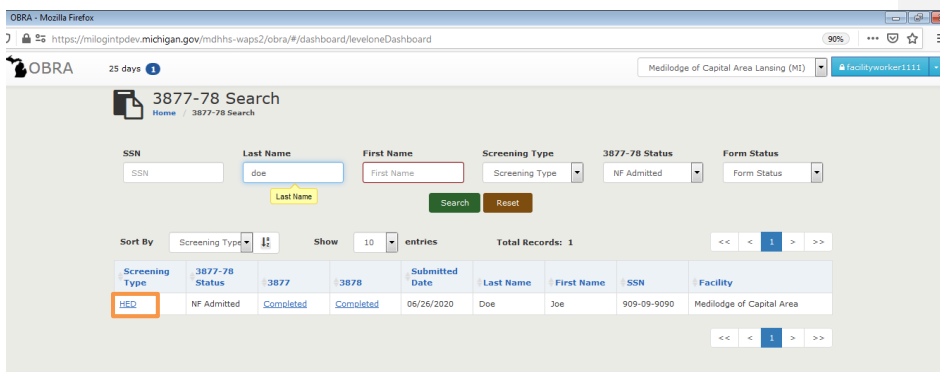
Click on the Screening type HED link and land on the 3877-78 Detail page.

If the Consumer is to be discharged, click on the Consumer name drop down and click on Expired/Discharged.
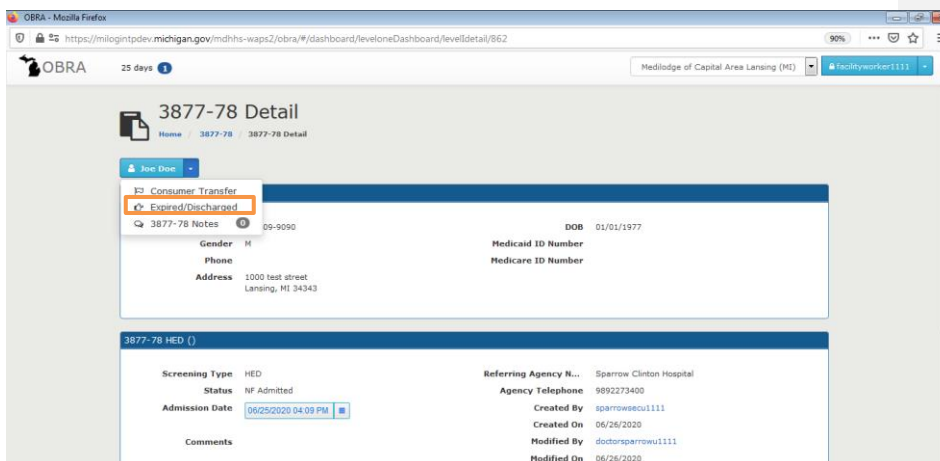
The following pop up message appears with options **Expired** and **Discharged** with the comments box as shown below. **Discharged** will be selected by default.

Select the Discharge date and click on Submit.

Note: Same approach can be used to mark a Consumer as Expired if the consumer expires during his stay in the Facility.

If the Facility has decided to send the screening to CMH, clicking on the Detail record will show the Send to CMH option as shown below.

From the list of **CMH Agencies** in the Agency dropdown select an Agency, enter comments and click on Submit. These are the CMH Agencies local to the Referral Facility.
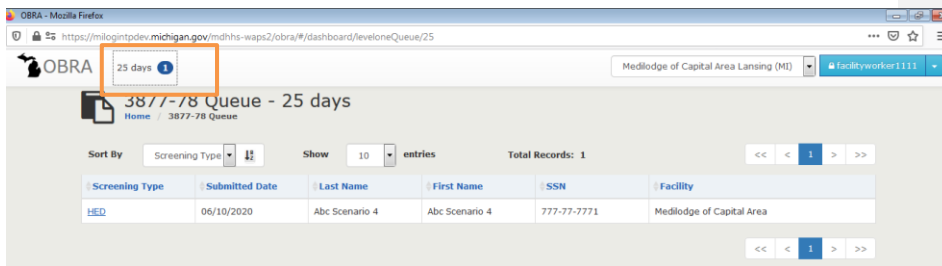
CMH Coordinator will take necessary actions. Covered under the CMH user Manual

Second Approach:

If no action has been taken by the Facility on the Consumer till 25 days from when the Consumer was admitted, a record will be populated in the 25 Day queue.

Click on the **HED Link** and navigate to the 3877-78 Detail page. The user can perform the following options as in the First approach.

- Send to CMH
- Expired
- Discharge

Steps covered in First approach.

Screening Types and who can initiate what Screenings

From the table below, a Hospital can initiate a PAS and can be converted to an HED screening. A Nursing Home can initiate ARR and CIC.

Facility type	PAS	ARR	HED (converted from PAS)	CIC
County Medical Care Facility		Y		Y

Home Health Agency	Y			
Hospice Facilities	Y			
Hospital	Y		Y	
Hospital Long Term Care Unit	Y		Y	
Nursing Home		Y		Y
Partial Psy Hospital Programs	Y			
Physician	Y			
Psychiatric Hospitals	Y			
Social Services Agency	Y			
Treatment facility aged	Y			
Veteran facilities	Y	Y	Y	Y

For a Hospital, the Create 3877-78 screen shows:

For a Nursing Home, the Create 3877-78 screen shows:

User selects ARR:

User selects CIC (options appear under), but not mandatory to fill them:

Level I Screening

* Screening Type [CIC ▾]

☐ Out of State Admission
☐ Medical Hospitalization during HED
☐ Addition of new classification of psychotropic medication
☐ New mental health symptoms
☐ Other

[Reset] [Cancel] [Next]

PAS Flow (not HED):

Steps (3877 and 3878):

S.No	3877/78 Status	3877 Status	3878 Status	Description
1	In Progress	Assigned		3877-78 has been initiated / In Process 3877 has been Assigned 3877 is In Process, not completed
2	In Progress	Completed		One of Questions 1-6 is YES 7th Question is YES
3	In Progress	Completed	Assigned	3877 is completed NF assignment has not been initiated yet
4	Waiting for NF	Completed	Completed	3878 User marks Coma OR Dementia
5	Waiting for NF	Completed	Completed	Requests sent to various Facilities to admit the patient and NFs will start to accept/reject the request
6	Waiting for NF	Completed	Completed	-At least one Facility has expressed the willingness to accept the patient -3877 User assigns the facility
7	NF Accepted	Completed	Completed	3877 User Assigns the NF

S.No	3877/78 Status	3877 Status	3878 Status	Description
8	Completed	Completed	Completed	NF updates the Admission date when the Patient physically is in the Facility

Steps (3877 only):

S.No	3877/78 Status	3877 Status	3878 Status	Description
1	In Progress	Assigned		3877-78 has been initiated / In Process 3877 has been Assigned 3877 is In Process, not completed
2	In Progress	Completed		One of Questions 1-6 is YES 7th Question is NO
3	Form Complete	Completed		
4	Level II Ready	Completed		3877 User sends the Screening to CMH Agency

ARR Flow:

Steps (3877 and 3878):

S.No	3877/78 Status	3877 Status	3878 Status	Description
1	In Progress	Assigned		3877-78 has been initiated / In Process 3877 has been Assigned 3877 is In Process, not completed
2	In Progress	Completed		One of Questions 1-6 is YES 7th Question is YES
3	In Progress	Completed	Assigned	3877 is completed NF assignment has not been initiated yet
4	NF Admitted	Completed	Completed	NF updates the Admission date when the Patient physically is in the Facility
5	Level II Ready	Completed	Completed	

Steps (3877 only):

S.No	3877/78 Status	3877 Status	3878 Status	Description
1	In Progress	Assigned		3877-78 has been initiated / In Process 3877 has been Assigned 3877 is In Process, not completed
2	In Progress	Completed	Completed	One of Questions 1-6 is YES 7th Question is NO
3	NF Admitted	Completed	Completed	
4	Level II Ready	Completed		3877 User sends the Screening to CMH Agency

PAS Flow: 3877 Only

On the 3877 Form, the Role-3877 user selects **NO** to question no.7 but selects **YES** to one of the questions 1-6.
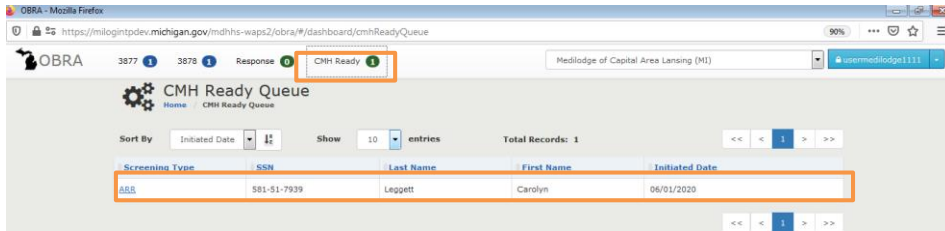
* This section of form must be completed by a Registered Nurse, Licensed Bachelor or Master Social Worker, Licensed Professional Counselor, Psychologist, Physician's Assistant, Nurse Practitioner or a Physician

Screening Criteria (All 7 items must be completed.)

	Yes	No
1. The person has a current diagnosis of: ○ Mental Illness ○ Dementia ○ Both	○	●
2. The person has received treatment for: ○ Mental Illness ○ Dementia (within the past 24 months) ○ Both	○	●
3. The person has routinely received one or more prescribed antipsychotic or antidepressant medications within the last 14 days.	●	○
4. There is presenting evidence of mental illness or dementia including significant disturbances in thought, conduct, emotions, or judgment. Presenting evidence may include, but is not limited to, suicidal ideations, hallucinations, delusions, serious difficulty completing tasking, or serious difficulty interacting with others.	○	●
5. The person has a diagnosis of intellectual/developmental disability or a related condition, including but not limited to epilepsy, autism, or cerebral palsy, and this diagnosis manifested before the age of 22.	○	●
6. There is presenting evidence of deficits in intellectual functioning or adaptive behavior which suggests that the person may have intellectual/developmental disability or a related condition.	○	●
7. Qualifies for Exemption? (Coma, Dementia, Hospital Exempt Discharge)	○	●

Submit the form.

For the Role-3877 user, the **CMH Ready** queue count increases by 1.

Click on the Screening type and land on the 3877-78 Detail Page.

The status of the 3877-78 screening would be **Form Complete**. There would be an option for the Role-3877 user to send the screening to the **nearest CMH Agency**. The list of CMH Agencies local to the Referral Facility source would be present under the **Agency** dropdown as shown below.

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Select the Agency, enter comments and click on "Submit".

CIC and ARR Flow: 3877 Only

On the 3877 Form, the Role-3877 user selects **NO** to question no.7 but selects **YES** to one of the questions 1-6.
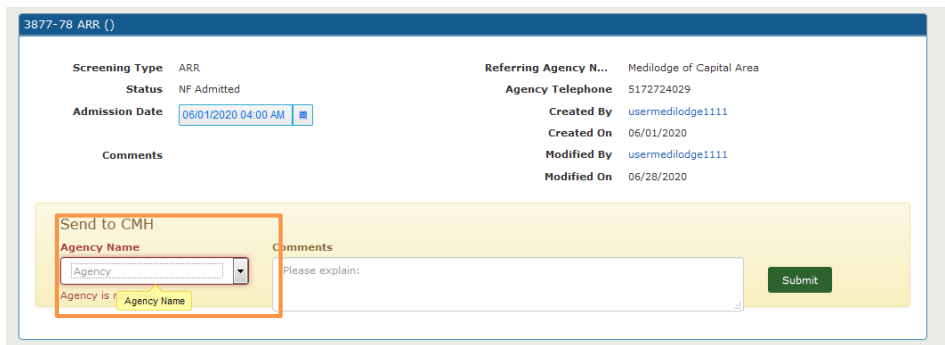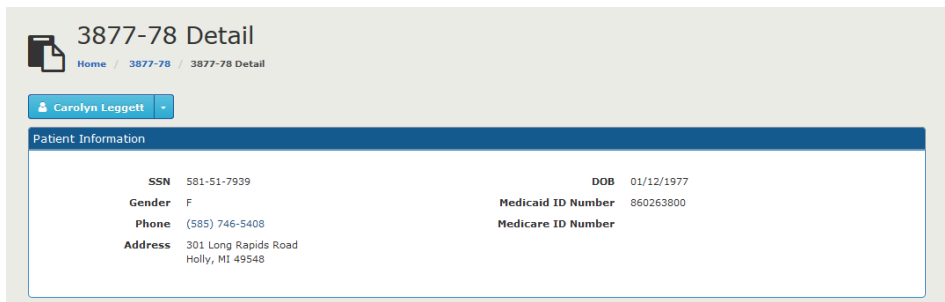

Submit the form.

For the Role-3877 user, the **CMH Ready** queue count increases by 1.

Click on the Screening type and land on the 3877-78 Detail Page.

The status of the 3877-78 screening would be **Form Complete**. There would be an option for the Role-3877 user to send the screening to the **nearest CMH Agency**. The list of CMH Agencies local to the Referral Facility source would be present under the **Agency** dropdown as shown below.

Select the Agency, enter comments and click on "Submit".

CIC and ARR Flows: 3878 Form

No HED Option on the 3878 Form in Section 2:

3877-78 Detail Page

One of the most important screens, if not the most, is the 3877-78 Detail page. There are a variety of functions available in this page.

Screen Entry

- Click on Screening type on the 3877-78 Search Module
- Click on Screening type if hyperlink enabled on the Queues

3877-78 Search Module:

Screening Type from Queues (if enabled):

Consumer Name Dropdown

- Initiate 3877-78
  - This will initiate a new 3877-78
- Consumer transfer
  - Please refer Page 96
- Expired (dealt with in a different section, page number)
  - Mark a consumer as Expired
  - 3877-78 Status will be Not Needed
  - Date will be marked as current date by default but user has the capability to change it to a past date

- o Discharged (Screenshot provided – Page 80)
  - Mark a consumer as Discharged
  - 3877-78 Status will be Not Needed
  - Date will be marked as current date by default but user has the capability to change it to a past date
- o 3877/78 Notes
  - This is the provision for the Facility/Hospital to enter notes, this is enabled for the following roles
    - Role-3877
    - Facility Admin
    - Facility Admissions
    - Facility Worker
  - Will be sorted in descending order of notes entered date with user ID and Timestamp of when the note was entered
  - Will display the number of notes entered
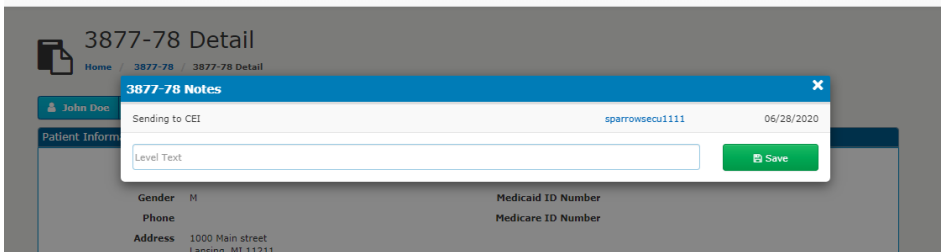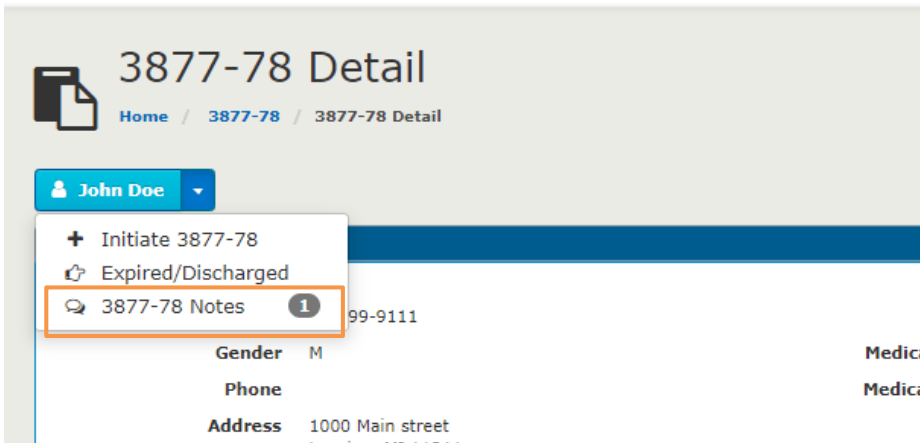
No Longer Needed

- For a first time consumer with no 3877's or 3878's in the system, this will delete the current 3877 and 3878 data for the consumer including the consumer details

- For an existing consumer who has a Level-II in the system, this will delete the current 3877 and 3878 data for the consumer. The Consumer data will not be deleted.

Clicking on **No Longer Needed** will generate a pop up message as shown below.

Clicking on **YES** will delete all the data as displayed in the message.

Patient Information

- The following fields will be displayed on Read only mode. These will be the latest values from the Database
    - SSN (XXX-XXX-XXXX)

- Phone (XXX-XXX-XXXX)
- Address
- DOB
- Gender
- Medicaid Beneficiary ID number
- Medicaid ID number
- Status

Patient Information			
SSN	909-09-9090	DOB	01/01/1977
Gender	M	Medicaid ID Number	
Phone		Medicare ID Number	
Address	1000 test street Lansing, MI 34343		

Screening type Details

- Section name -> 3877-78 (<Screening Type>)
- The following fields will be displayed on Read only mode, populated from the 3877 Form
    - Screening Type
    - Status of 3877-78
    - Admission Date and Update Button
        - o For screening type PAS, the Admissions date will be blank by default
        - o For screening type ARR or CIC, the Admissions date will be populated from the 3877 form
        - o This capability is available only for user role - Facility Admissions
        - o The update button will be enabled only for the following scenarios
            - 3877/78 Status is NF Assigned
            - 3877/78 Status is NF Admitted
    - "Send to CMH" option (For PAS, HED, ARR and CIC screening types)
        - o For Screening types HED, ARR or CIC, the option will be available only for Evaluations with 3877/78 Status "NF Admitted" For Screening type PAS, the option will be available for Screenings with 3877-78 Status as "Form Complete"
        - o There will be option (Not mandatory) to enter comments while sending to CMH
        - o Upon click of "Send to CMH",
            - The Referral date will be populated with current date
            - There will be a dialogue box with an option to select a CMH Agency name if the Assigned Facility belongs to multiple CMH Agencies
            - The CMH Agencies will be populated based on the Assigned facility name
            - There will be a dialogue box with only one prepopulated CMH Agency Name if the Facility belongs to only one CMH

- Referring Agency Name
- Agency Telephone
- Created By
- Created On
- Modified By
- Modified On

3877-78 PAS ()			
Screening Type	PAS	Referring Agency Name	Sparrow Clinton Hospital
Status	Level-II Ready	Agency Telephone	9892273400
Admission Date		Created By	sparrowsecu1111
		Created On	06/28/2020
Comments	Sending to CEI	Modified By	sparrowsecu1111
		Modified On	06/28/2020

3877-78 Forms:

- o 3877 Form – this will be hyperlinked only when the 3877 Form status is completed
  - Upon click, the 3877 Form will be opened in a new window
- o 3878 Form– this will be hyperlinked only when the 3877 Form status is completed
  - Upon click, the 3878 Form will be opened in a new window
- o View All
  - This will print the completed forms in PDF format in a new window in the order – 3877 and then 3878

3877-78 Forms		
3877 Form	**3878 Form**	View All

Facility Assignment:

This is described under the HED Flow (Page number)

Consumer Transfer

This system has the flexibility to handle various scenarios involving transferring Consumers from one facility to another during an in progress 3877/78 and in progress Level-II

For users from facilities which can initiate only PAS:

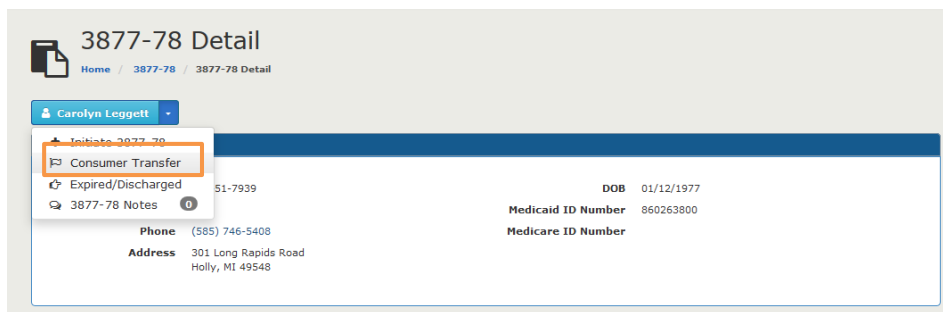**No Consumer Transfer** option available.

For users from facilities which can initiate only ARR and CIC:

Consumer Transfer option available under the Consumer name dropdown for user types Facility Admissions, Role-3877.

This option will be available only when:

a) There is a one completed 3877 and/or 3878 forms associated with the Consumer
b) There is no active in progress 3877 and/or 3878 forms associated with the Consumer

3877-78 Detail

Home / 3877-78 / 3877-78 Detail

👤 Carolyn Leggett ▾

Initiate 3877-78
🏳 Consumer Transfer
↻ Expired/Discharged
💬 3877-78 Notes 0

51-7939   DOB   01/12/1977
                              Medicaid ID Number   860263800
Phone (585) 746-5408   Medicare ID Number
Address 301 Long Rapids Road
         Holly, MI 49548

Click on **Consumer Transfer**:

Detail

Consumer Transfer   ✕

Current Facility: Aberdeen Rehabilitation and Skilled Nursing Center

*

* **New Facility:**

New Facility   ▾

1st Choice Home Care Warren (MI)
1st State Home Healthcare Saginaw (MI)
21st Century Home Health Care Bridgeman (MI)
24-Seven Home Health Care Services Southfield (MI)
247 Home Health Care Taylor (MI)
4 Star Home Health Care Southfield (MI)
A Plus Home Health Care Lathrup Village (MI)
A Plus Hospice & Palliative Care Troy (MI)
A&D Health Care Professional Saginaw (MI)
A&D Hospice Saginaw (MI)
A-1 International Homecare Plymouth (MI)
A-One Hospice Davison (MI)
A1 Home Health Care Oak Park (MI)
ABC Home Care Madison Height (MI)

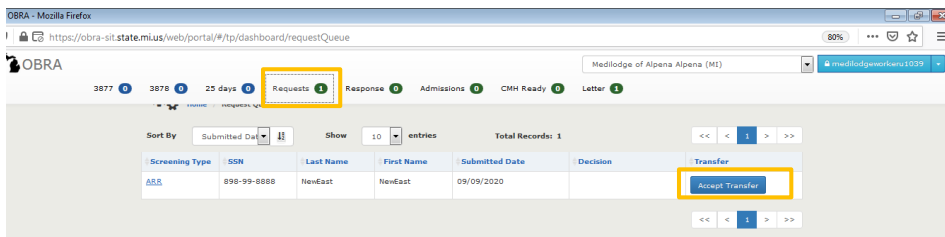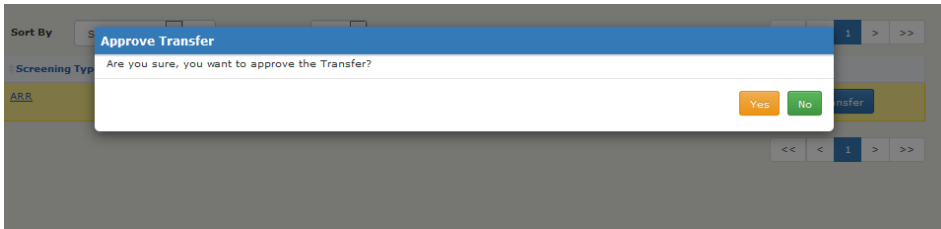Select the **New Facility** from the drop down and click on **Save**.
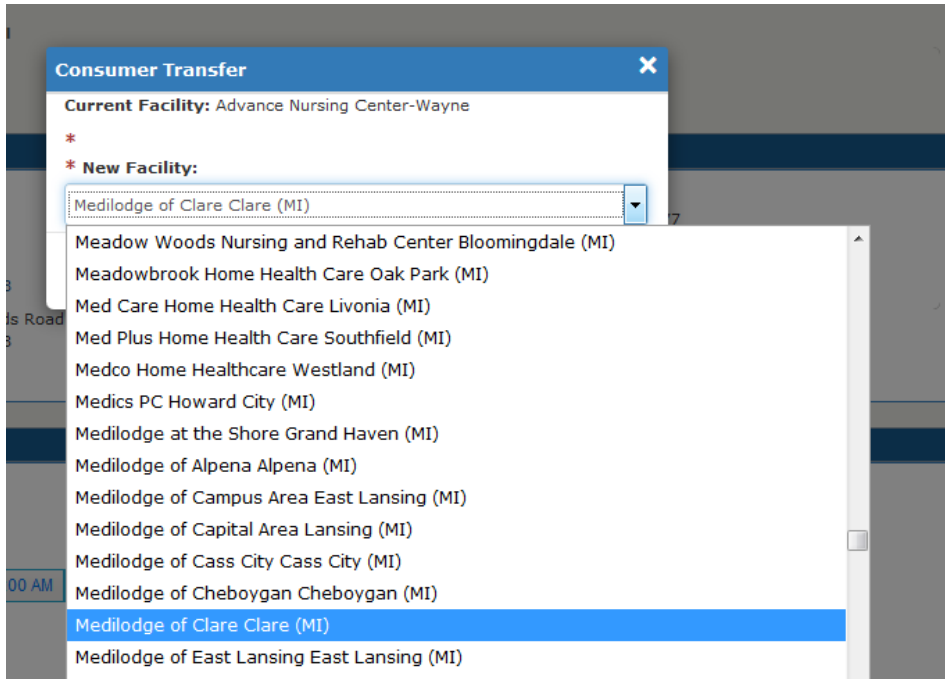
Once the Consumer Transfer request is sent to the facility, the new facility will need to login and approve the request from the "Requests" queue.
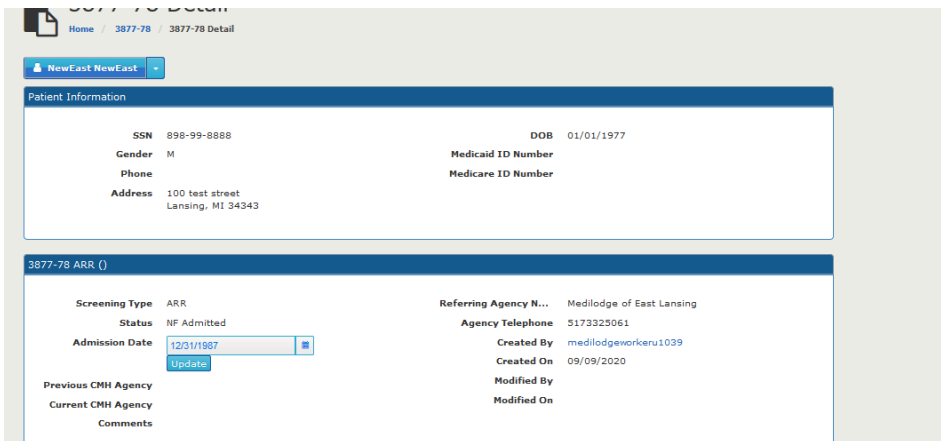
Click on "Accept transfer" button in order to accept the Consumer Transfer.

Upon click of "Yes",

User lands on the 3877-78 Detail page:

The user is navigated to the 3877-78 Detail page. The facility in the Facility Assignment section would have changed to the new facility.

Letters

Users with Role-3877 has a "Letters" queue

This queue has records whenever a Coordinator has made a decision on the Screening type.

The Role-3877 user opens the record from the letter queue by clicking on the row.