

**Kansas Department for Aging and Disability Services**  
**Community Transition Opportunities (CTO)**  
**Local Contact Agency Instructions**

---

**Table of Contents**

---

General Instructions .....	2
Accessing the Application .....	3
Signing In .....	4
Accessing the CTO Application .....	5
CTO Report .....	6
LCA Worksheet Process .....	7
Opening a CTO Worksheet.....	8
Local Contact Agency (LCA) Section of the CTO Worksheet .....	9
LCA Section Field Requirements .....	10
LCA Billing Document – Maximum 12 Units .....	10
Waiting List Information .....	10
Saving the CTO Worksheet.....	11
Worksheet Status .....	12
Logging-Out .....	14

---

# General Instructions

---

## Overview

The CTO Application is a KDADS web application. This application is integrated with the Adult Care Home Facility Web Application and the Kansas Assessment Information System (KAMIS). The Adult Care Home Facility Web Application will be used for the Nursing Facility information. KAMIS will be used for processing payments to the Local Contact Agency (LCA) and KDADS reporting requirements.

---

## System Requirements and Browser Settings

- **Firewall Settings** may need added.
    - To check if you will be able to access the KDADS Web Application site, follow the steps on pages 3-4. If the sign in page does not display, our site will need to be added to your firewall. Please contact the KDADS Help Desk for the specific address/port to be added to the firewall.
  - Internet Connection
  - Internet Browser:
    - Microsoft Internet Explorer 6.0 or newer - Recommended
    - Firefox – current version
  - Disable all Pop-Up blockers
- 

## Contact Persons

Issue	Contact Person
Application How To Questions Password Change	KDADS Help Desk <b>Phone:</b> (785) 296-4987 or (800) 432-3535 <b>E-Mail:</b> HelpDesk@kdads.ks.gov
Questions about the CTO Policies and Guidelines.	Lacey Vaughan <b>Phone:</b> (800) 432-3535

---


# Accessing the Application

## Introduction

Use Microsoft Internet Explorer or FireFox browser to access the KDADS web application site. All KDADS Web Applications are secured and encrypted.

## How To

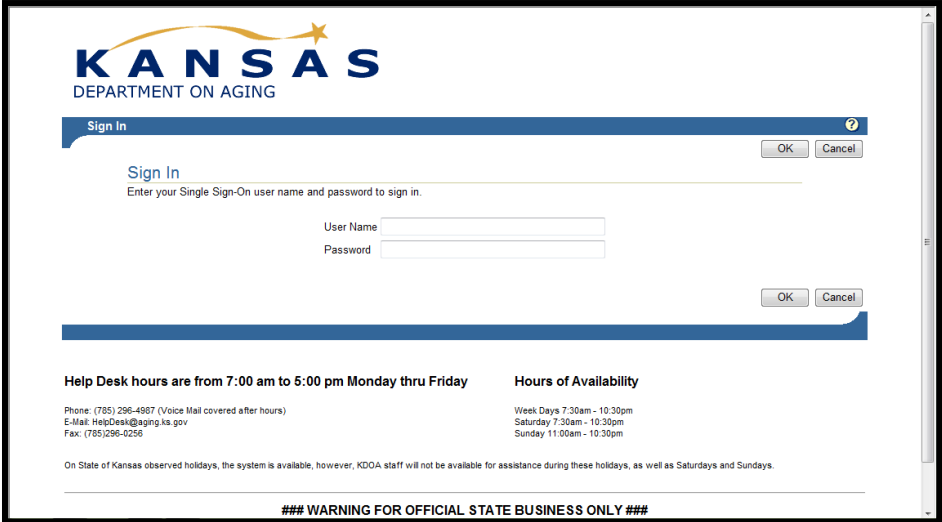
Follow the steps in the table below to accessing the login page for the KDADS Web Application.

Step	Action	Result
1.	<p>Open the internet browser. Access the KDADS Provider Information Resource Web Site.</p> <p><a href="http://www.aging.ks.gov">www.aging.ks.gov</a></p>	<p>The KDADS Provider Web Site Home Page will be displayed.</p>
		
2.	<p>Select the <b>Web Applications</b> link under the “Other Resource Link” section or the Web Applications Menu.</p>	<p>The KDADS Web Application Login page will display.</p>

# Signing In

## How To

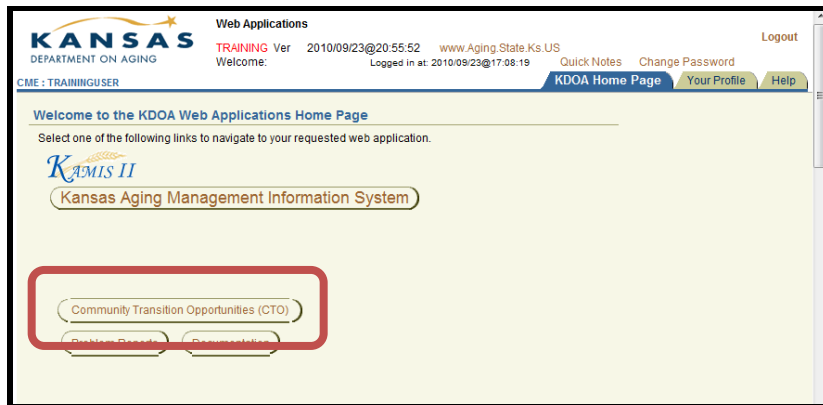
Follow the steps in the table below to complete the Sign in process.

Step	Action	Result
1.	<p>Once the Sign in page is displayed.</p> <p>Type the <b>User Name</b>.</p> <p>Press <b>Tab</b>.</p>	<p>Insertion point advances.</p>
		
2.	<p>Enter <b>Password</b>. If it is the first time signing into the application, use the initial password that was given.</p> <p>Click the <b>OK</b> button.</p>	<p>The Web Application Home page will display.</p>

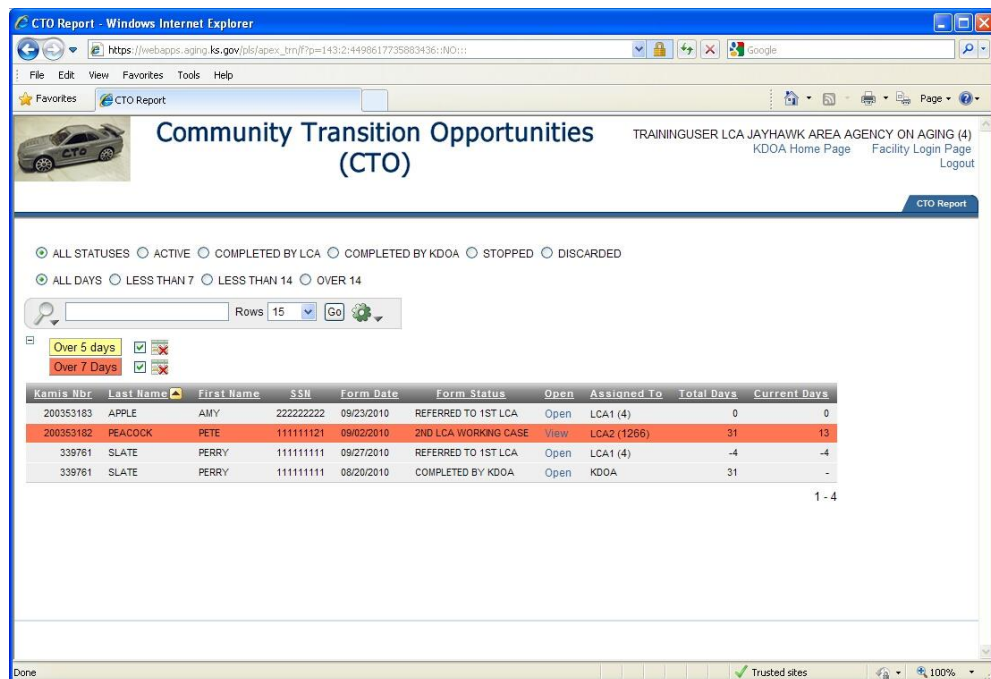
# Accessing the CTO Application

**How To** Follow the steps in the table below to access the Community Transition Opportunities (CTO) application.

Step	Action	Result
1.	To access the CTO Application, click on the <b>Community Transition Opportunities (CTO)</b> button.	



2.	Opens to the <b>CTO Report</b> page of the CTO Application.	
----	---	--



# CTO Report

## Introduction

The report displays the customers with worksheets that have an association with the users Organization.

Filters

Search Field

Red color coded =  
Over 7 days

Yellow color coded =  
Over 5 days

Kamis Nbr	Last Name	First Name	SSN	Form Date	Form Status	Open	Assigned To	Total Days	Current Days
30000501	ROCK	BILL	111111111	10/3/2010	1 <sup>st</sup> LCA Accepted	Open	LCA1 (4)	15	15
30000501	STONE	GEORGE	111111112	10/10/2010	1 <sup>st</sup> LCA Working Case	Open	LCA1 (1154)	3	3
30000504	PAPER	JEFF	111111113	9/14/2010	2 <sup>nd</sup> LCA Accepted	Open	LCA2 (4)	9	9
30000505	FLINT	SUSAN	111111114	9/3/2010	2 <sup>nd</sup> LCA Working Case	Open	LCA2 (4)	-	-
30000506	CLAY	RED	111111115	10/3/2010	Completed by KDOA	View	KDOA	15	15
30000508	MUD	RIVER	111111116	10/7/2010	Completed by LCA	Open	KDOA	4	4
30000439	PEACH	MARY	111111117	10/7/2010	Declined by LCA	Open	LCA2 (1154)	6	5
30000526	APPLE	AMY	111111118	9/2/2010	Discarded	View	KDOA	0	-
30000526	DINO	DONALD	111111119	9/1/2010	Referred to 1 <sup>st</sup> LCA	Open	LCA1(4)	7	6
30000358	BOULDER	SHARRY	111111120	10/16/2010	Referred to 2 <sup>nd</sup> LCA	Open	LCA2 (1154)	6	2
30000355	PEACOCK	PETE	111111121	9/6/2010	Stopped - By User - PSA Notified	View	LCA1 (4)	0	-
30000852	RUBBLE	BARNEY	111111122	9/3/2010	Stopped - CTO in Last 30-45 Days	View	KDOA	0	-
30000853	RUBBLE	BETTY	111111123	9/4/2010	Stopped - On Waiting List	View	KDOA	0	-
30000854	SLATE	PERRY	111111124	9/5/2010	Stopped - Open CTO	View	KDOA	0	-
30000855	FLINTSTONE	ED	111111125	9/6/2010	Work in Progress	Open	NF - N12345	-	-

The report is also interactive by utilizing the column headings to sort or filter by the content.

Kamis Nbr	Last Name	First Name	SSN	Form Date	Form Status	Open	Assigned To	Total Days	Current Days
200353156	BOULDER	SHARRY	111111120	09/20/2010			LCA1 (1266)	5	5
200353159	PEACH	MARY	111111117	09/17/2010			-	0	-
200353159	PEACH	MARY	111111117	09/16/2010			-	0	-
200353159	PEACH	MARY	111111117	09/15/2010			-	0	-
200353162	PEACOCK	PETE	111111121	09/02/2010			LCA2 (1266)	33	15
339761	SLATE	PERRY	111111111	09/27/2010			LCA1 (4)	-2	-2
339761	SLATE	PERRY	111111111	08/20/2010			KDOA	31	-
200353165	STONE	FLINT	555555555	09/21/2010			NF - N12345	0	-

# LCA Worksheet Process

---

## Introduction

The LCA's will need to check the CTO Report on a daily basis to see if any referrals have been made to their organization.

There are automated system processes that will move the referral from the 1<sup>st</sup> LCA to the 2<sup>nd</sup> LCA on the 8<sup>th</sup> day if the CTO Worksheet status is not one of the statuses listed below :

- 1<sup>st</sup> LCA Working Case
- Completed by LCA

Therefore, it is important that upon the decision that the case will be worked by the LCA, that the status on the case be changed to either one of the below statuses:

**1<sup>st</sup> LCA Accepted** which will indicate to others that the case has been seen and assigned. This status will not stop the automated process of forwarding the referral to the 2<sup>nd</sup> LCA after on the 8<sup>th</sup> day.

**1<sup>st</sup> LCA Working Case** which will indicate to others that the case has been assigned and is currently being worked. This status will stop the automated process of forwarding the referral to the 2<sup>nd</sup> LCA after on the 8<sup>th</sup> day.

If the 1<sup>st</sup> LCA will not be able to work the case due to staffing or other issues, the status can be changed to Declined by LCA, which in turn will immediately refer the case to the 2<sup>nd</sup> LCA.

The other statuses are further explained on pages 12 and 13.

---

# Opening a CTO Worksheet

---

**Introduction** All worksheets entered and referred to an Organization will be listed on the CTO Report.

---

**How to** Follow the steps in the table below to open an existing form:

Step	Action	Result
1.	Locate customer on the CTO Report.	
2.	In the Report Table, click on the <b>Open</b> or <b>View</b> link.	The worksheet will display in read only status.

Kamis Nbr	Last Name	First Name	SSN	Form Date	Form Status	Open	Assigned To	Total Days	Current Days
30000501	ROCK	BILL	111111111	10/3/2010	1 <sup>st</sup> LCA Accepted	Open	LCA1 (4)	15	15
30000501	STONE	GEORGE	111111112	10/10/2010	1 <sup>st</sup> LCA Working Case	Open	LCA1 (4)	3	3
30000506	CLAY	RED	111111115	10/3/2010	Completed by KDOA	View	KDOA	15	15
30000505	FLINT	SUSAN	111111114	10/10/2010	1 <sup>st</sup> LCA Working Case	Open	LCA1 (4)	3	3

---



# Local Contact Agency (LCA) Section of the CTO Worksheet

## Introduction

A table of the Field requirements, actions and/or purpose are located on the next page.

The screenshot displays the 'Community Transition Opportunities (CTO)' web application. The user is logged in as 'TRAININGUSER LCA.JAYHAWK AREA AGENCY ON AGING (4)'. The main header shows the user's name 'APPLE, AMY' and various identifiers like 'KAMS # 200353183', 'Effective: 09/21/2010', 'SSN: 222222222', and 'CME: 10'. The 'Form Status' is 'REFERRED TO 1ST LCA'. The 'Nursing Facility Referral' section lists details for 'JAYHAWK AREA AGENCY ON AGING' and 'TOPEKA INDEPENDENT LIVING RESOURCE CENTER'. The 'Local Contact Agency (LCA)' section is highlighted with a red oval and contains the following fields: LCA Organization (JAYHAWK AREA AGENCY ON AGING), LCA Contact Date, Customer Chose To Explore Transition Options (Yes), Referrals as needed to (Ombudsman, DRC, Other), Date Referred to TCM, TCM Name, TCM Phone, and LCA Comments. The 'KDOA Follow-Up' section is also highlighted with a red oval and includes fields for KDOA Follow-Up Date, Notes (TCM, DRC, OMB, Other), and Customer Status (Transitioned, Declined, Contacted, No Action Referral). The 'LCA Billing Document - Maximum 12 Units' section includes Meeting Length, Coordination & Planning Time, and LCA Billing in Units.

## LCA Section Field Requirements

---

Field	Action / Purpose
Form Status	Since the worksheet was referred, the default status will be either "Referred to 1 <sup>st</sup> LCA" or "Referred to 2 <sup>nd</sup> LCA".
LCA Organization	Required – Defaults to the LCA the Nursing Facility referred the case.
LCA Contact Date	Required.
Customer Chose To Explore Transition Options	Required.
Referrals as needed to: <ul style="list-style-type: none"> <li>• Ombudsman</li> <li>• DRC</li> <li>• Other</li> </ul>	Required. Note: If "Other" is Yes, the description field is required.
Date Referred to TCM	Required.
TCM Name	Required.
TCM Phone	Required.
NF Comments	Not Required.

---

## LCA Billing Document – Maximum 12 Units

---

Field	Action / Purpose
Meeting Length in Units	Required.
Coordination & Planning Time in Units	Required.
LCA Billing in Units	Calculates.

---

## Waiting List Information

---

Field	Action / Purpose
On Waiting List	Not Required.
Waiting List Start Date	Not Required.
Waiting List Comments	Not Required.

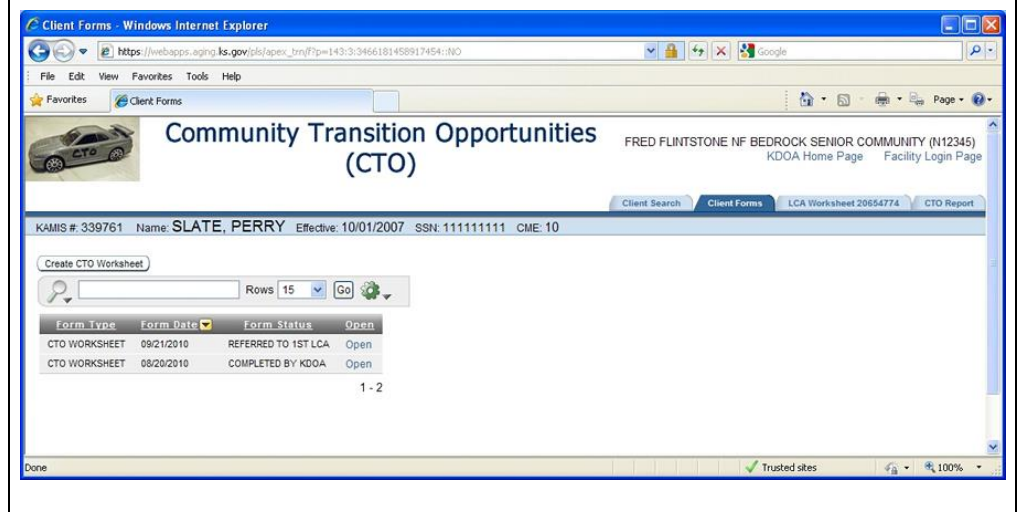
---

# Saving the CTO Worksheet

## How To

Follow the steps in the table below to create/save a worksheet.

Step	Action	Result
1.	Complete the required worksheet fields.	
2.	Click the Form Status drop down box and select the appropriate status.	In most situations, this will be the <b>Completed by LCA</b> status.  See the next page for the different Worksheet statuses.
3.	Click on the <b>Apply Changes</b> button.	The worksheet will be saved and all fields will be displayed as read only.  The page will forward to the Client Forms page for review.



## Worksheet Status

---

**Worksheet Status**

Not all statuses are available to all organization types. However, the statuses will be listed on the CTO Report page. The table below lists all the worksheet statuses, which organizations will have the status available to use and the purpose of the status.

Status	Available To...	Purpose
Work In Progress	Adult Care Home	Initial status prior to the worksheet being created or while it is being completed by the Adult Care Home.
Referred to 1 <sup>st</sup> LCA	Adult Care Home	Adult Care Home has completed data entry of the worksheet and refers it to the 1 <sup>st</sup> LCA for action.
Discarded	All Organizations	Worksheet done in error. Closes the case without further action.
Stopped – By User – AAA Notified	All Organizations	Will stop the referral of the worksheet. The user will need to contact the Area Agency on Aging (AAA) by phone regarding the reason for the status.
1 <sup>st</sup> LCA Accepted	1 <sup>st</sup> LCA	Indicates that the LCA has seen and accepts the referral.
1 <sup>st</sup> LCA Working Case	1 <sup>st</sup> LCA	Indicates that the LCA is actively working the case. This status will stop the case from being automatically referred to the 2 <sup>nd</sup> LCA after 7 business days.
Declined by LCA	1 <sup>st</sup> LCA	Indicates that a condition occurred where the 1 <sup>st</sup> LCA is unable to accept and work the case. Will forward the case to the 2 <sup>nd</sup> LCA.
2 <sup>nd</sup> LCA Accepted	2 <sup>nd</sup> LCA	Indicates that the LCA has seen and accepts the referral.
2 <sup>nd</sup> LCA Working Case	2 <sup>nd</sup> LCA	Indicates that the LCA is actively working the case.
Completed by LCA	LCA	Indicates that the LCA portion of the case has been completed. Forwards the payment information into KAMIS. Refers the case to KDADS for payment authorization and processing.

*Continued on next page*

## Worksheet Status (continued)

### Worksheet Status *continued*

Status	Available To...	Purpose
Completed by KDADS	KDADS	KDADS is the final step in the worksheet process. This closes the case.
Referred to 2 <sup>nd</sup> LCA	Automated	System Automated. If 7 business days have passed since the referral date and the status is either "Declined" or "Referred to 1 <sup>st</sup> LCA", the system will refer the case to the 2 <sup>nd</sup> LCA listed on the worksheet.
Stopped – Open POC	Automated	An active Plan of Care has been found in KAMIS. Contact the AAA for resolution.
Stopped – On Waiting List	Automated	Once there is a worksheet entered with an indication that the customer is on a waiting list, any future worksheet referrals will be stopped.  KDADS has the ability to release the customers record if they should be removed from a waiting list or if the waiting lists are discontinued.
Stopped – Open CTO	Automated	An open worksheet has been found. This would be a duplicate referral, which is not required to be entered.
Time Limit Exceeded	Automated	Indicates that the 1 <sup>st</sup> LCA did not meet the time limitations and the case was referred to the 2 <sup>nd</sup> LCA.  This may have occurred two reasons:  1. LCA did not complete the worksheet within the 15 days. 2. LCA did not change the status to 1 <sup>st</sup> LCA Working Case.  This status will be displayed next to the 1 <sup>st</sup> LCA's line on the worksheet.

# Logging-Out

---

## Introduction

When the user will not be using the application for a period of time, the program should be closed for security reasons.

---

## How To

Follow the steps in the table below to exit the application.

Step	Action	Result						
1.	In the upper right corner of the window there are three navigational options.							
<table border="1"><thead><tr><th>Link</th><th>Action</th></tr></thead><tbody><tr><td>Logout</td><td>The browser will return to the Log-in page</td></tr><tr><td>KDADS Home Page</td><td>Returns back to the KDADS Home Page for further access options.</td></tr></tbody></table>			Link	Action	Logout	The browser will return to the Log-in page	KDADS Home Page	Returns back to the KDADS Home Page for further access options.
Link	Action							
Logout	The browser will return to the Log-in page							
KDADS Home Page	Returns back to the KDADS Home Page for further access options.							

---