## Children's Long-Term Support Rate Setting Outlier Request Processing Application

April 28, 2025



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#### **1** Introduction

The Children's Long-Term Support Rate Setting Outlier Request (CRSOR) processing application has been created in OnBase to provide an automated processing system for County Waiver Agencies (CWAs) to request Outliers for the Children's Long-Term Support (CLTS) program. The application will allow CWAs to create and submit CRSORs to the Wisconsin Department of Health Services (DHS) for review and approval. CWAs will be able to access the CRSOR processing application via their secure Waiver Agency page on the ForwardHealth Portal.

## **2** Getting Started

Both public and secure information is accessible through the Portal. Public information is accessible to all users; however, to gain access to secure information and to conduct business with ForwardHealth, users are required to establish a secure account within the Portal.

The Portal allows authorized users to conduct business through a secure entry point 24 hours a day, seven days a week.

#### **2.1 New Waiver Agencies**

DHS will collect the agency information and the administrator contact information to create the agency and agency administrator in the system. Once the agency administrator is created, a PIN letter will be mailed to the administrator who can begin setting up their account and using the Portal. This includes creating other users for the waiver agency. Administrators can refer to the <u>ForwardHealth Provider Portal Account User Guide</u> for detailed instructions about setting up accounts.

Access to the secure Portal is **not** possible without a PIN. The letter also includes a Login ID, which is a health care provider's Waiver Agency ID. For security purposes, the Login ID contains only digits three–six of the Waiver Agency ID.

#### 2.2 Help Desk Information

Users who encounter any issues with Portal functionality should contact the Portal Help Desk at 866-908-1363.

## **3 Accessing the Secure Waiver Agency Page**

1. Access the ForwardHealth Portal at <u>https://www.forwardhealth.wi.gov/</u>.

Wiscontin gov home state agencies at ForwardHealth Wisconsin serving you	bject directory departn	nent of health services		Rep	Search Search Welcome » February 8, 2022 12:51
Providers • Provider-specific Resources	Welcome to the Forwar	dHealth Portal			Members • Find a Provider
Become a Provider     Fee Schedules     Wisconsin Administrative Code	COVID-19: Forwa	rdHealth Provider Ne	ws and Resources		Partners
ForwardHealth Enrollment Data ForwardHealth System Generated Claim Adjustments Health Care Enrollment Provider Revalidation	Attention: The information included on the ForwardHealth Portal is not intended for members enrolled or looking to enroll in Wisconsin Medicaid programs. Refer to the <u>Department of Health Services website</u> for member-specific information.				Find a Provider     Related Programs and Services     Express Enrollment for Children     Express Enrollment Change Request     Waiver Agencies
Enrollment Tracking Search     Bed Assessment e-Payment Medication Therapy Management Case Management Software	A A A A A A A A A A A A A A A A A A A	·			Trading Partners Trading Partner Profile
Acute and Primary Managed Care <ul> <li>Related Programs and Services</li> </ul>	Providers	Acute and Primary Managed Care	Adult Long-Term Care Programs	Children's Specialty Programs	PES     Companion Guides     Medication Therapy Management Case     Management Software Approval Process
ForwardHealth Enrollment Data     Health Care Enrollment	E Starter	R			Children's Specialty Programs
Manufacturer Drug Rebate CMS Medicaid Drug Rebate Program Pharmacy Information	Trading Partners	Manufacturer Drug Rebate	<u>Partners</u>	Members	Birth to 3 Program     Children's Long-Term Support Program     Katie Beckett Medicaid     Children's Specialty Managed Care Plans

Figure 1 ForwardHealth Portal Page

2. Click Login. A Sign In box will be displayed.

ForwardHealth				
	Sign In			
Userna	ime			
Ι				
C Kee	p me signed in			
	Next			
Unlock	account?			
Help				
Loggin	g in for the first time?			

Figure 2 Sign In Box

- 3. Enter the user's username.
- 4. Click **Next**. A Verify with your password box will be displayed.



Figure 3 Verify With Your Password Box

- 5. Enter the user's password.
- 6. Click Verify. The Secure Waiver Agency page will be displayed.

wisconsin.gov home state agencies department of health services	
ForwardHealth Wiscontin Borving you Waiver Agency Wei	lcome Waiver Agency Name > April 3, 2025 10:21 AM
Home         Search         Waiver Agency         Prior Authorization         Account         Contact Information           iC Functionality         User Guides         Certification         Message Center	Online Handbooks   Site Map
You are logged in as WAIVER AGENCY NAME	Search
CLTS User Guides	Account Information
Children's Long-Term Support Waiver Agency Portal	Switch Organization
Children's Long-Term Support Waiver Agency Prior Authorization     Children's Long-Term Support Waiver High-Cost Request	
Children's Long-Term Support Waiver Rate Setting Outlier Request	Ouick Links
Children's Long Term Support Waiver Program Eligibility and Enrollment	Waiver Enrollment Wizard
Children's Long-Term Support Waiver Agency interChange Functionality	Waiver Member Search
CLTS Waiver Agency Training	Waiver Pend Wizard
<ul> <li>Currently, there are no CLTS Waiver Agency Trainings available.</li> </ul>	<ul> <li>SUD Health Home User Guide</li> </ul>
CLTS Waiver Agency Reports	Letters     Waiver Agency Portal Admin
Encollment Change Report	Change Request
Total Member List Report	High-Cost and Outlier Requests
Disenrollment Report for Waiver Agencies	Persont Matrix
Predictive Disearalment Report	- Report Matrix
Link Report for Waiver Agencies	
Monthly Suspension Report for Waiver Agencies	
- montany suspension report for metric agences	

Figure 4 Secure Waiver Agency Page

#### 4 Roles for Accessing the Children's Long-Term Support Rate Setting Outlier Request Processing Application

The account administrator must initially establish accounts to allow access and assign roles for the various functions the users will be performing when accessing the CRSOR processing application. Assigned roles for the CRSOR processing application are as follows:

- CLTS Outlier Request County Submitter
- CLTS Outlier Request LSS (Lutheran Social Services) Asst Submitter
- CLTS Outlier Request County Approver
- CLTS Outlier Request LSS Approver

Refer to <u>Appendix: User Security Roles</u> for more information about the required user security roles.

#### 5 Accessing the Children's Long-Term Support Rate Setting Outlier Request Processing Application

1. From the secure Waiver Agency page, click **High-Cost and Outlier Requests** under Quick Links. Note: If the **High-Cost and Outlier Requests** link does not appear on the secure Waiver Agency page, the user does not have the correct security roles to access this functionality. If this user should have access and does not, the user should contact their local waiver agency administrator.

S wisconsin.gov home state agencies department of health services	
ForwardHealth Wisconsin sorving you	e Walver Agency Name > April 3, 2025 10:21 AM Loquut
Home         Search         Waiver Agency         Prior Authorization         Account         Contact Information         On           iC Functionality         User Guides         Certification         Message Center	line Handbooks   Site Map
You are logged in as WAIVER AGENCY NAME Waiver Agency	Search
CLTS User Guides	Account Information
Children's Long-Term Support Waiver Agency Portal	Switch Organization
Children's Long-Term Support Waiver Agency Prior Authorization	()
Children's Long-Term Support Waiver High-Cost Request	
Children's Long-Term Support Waiver Rate Setting Outlier Request	Quick Links
<ul> <li>Children's Long Term Support Waiver Program Eligibility and Enrollment</li> </ul>	Waiver Enrollment Wizard
<ul> <li>Children's Long-Term Support Waiver Agency interChange Functionality</li> </ul>	Waiver Member Search
CITC Weber Arrest Teleles	Waiver Pend Wizard
CLIS waiver Agency Training	SUD Health Home User Guide
Currency, there are no CLIS waiver Agency trainings available.	Letters
CLTS Waiver Agency Reports	Waiver Agency Portal Admin
Enrollment Change Report	Change Request
Total Member List Report	High-Cost and Outlier Requests
Disenrollment Report for Waiver Agencies	Report Matrix
Predictive Disenrollment Report	
Link Report for Waiver Agencies	
Monthly Suspension Report for Waiver Agencies	
control and and a second se	

Figure 5 Secure Waiver Agency Page

The CLTS One Time High-Cost and Rate Setting Outlier Requests page will be displayed.

wisconsin.gov home	state agencies	department of health services	
Forward	lHealtl	interChange Waiver Agency	Welcome Walver Agency Name » April 3, 2025 12:03 PM Logout
Home   Search 📕	Naiver Agency ser Guides   Cert	Prior Authorization   Acc ification   Message Cente	count   Contact Information   Online Handbooks   Site Map   er
You are logged in as WA	IVER AGENCY NAM High-Cost and	Rate Setting Outlier R	Search
The link below will take Service Request, or ac	e you to OnBase, w cess previously sub pplications	nere you can submit a CLTS R mitted requests.	late Setting Outlier Request or a High-Cost

Figure 6 CLTS One Time High-Cost and Rate Setting Outlier Requests Page

2. Click the CLTS Processing Applications link. A Sign In box will be displayed.

	Connecting to 🐼 Sign in with your account to access OnBase SAML - Produc	ction
	ForwardHealth	
	Sign In	
	Username	
	Keep me signed in	
	Next	
	<u>Unlock account?</u> <u>Help</u>	
Pow	vered by Okta Priva	acy Policy

Figure 7 Sign-In Box

3. Enter the username. Note: The user will use the same login information they used for logging in to the Portal.

4. Click **Next**. A Verify with your password box will be displayed.

ForwardHeal	th
Verify with your pass @ portaluser	sword
•••••	۲
Verify	
Forgot password? Verify with something else Back to sign in	

Figure 8 Verify With Your Password Box

5. Enter the password.

6. Click Verify. A Get a verification email box will be displayed.



Figure 9 Get a Verification Email Box

7. Click **Send me an email**. A box will be displayed indicating the email has been sent with a link to enter the code from the email.



Figure 10 Verify With Your Email Box

8. The email with the verification code sent to the user's email address includes a Sign In link.

One-time verification code				
Okta <noreply@okta.com> To Orovider, Ima (i) If there are problems with how this message is displayed, click here to view it in a web b</noreply@okta.com>	S Reply	≪ Reply All	→ Forward Tue 9/6/2022	1:11 PM
Click here to download pictures. To help protect your privacy, Outlook prevented autom CAUTION: This email originated from outside the organization. Do not click links or open attachments unless you recognize the sender and	latic download I know the co	of some pictures ir ontent is safe.	n this message.	
×				
Hi Ima,				
You have requested an email link to sign in to WIPortal. To finish signing in button below or enter the provided code. If you did not request this email contact an administrator at <u>bipana.subedi@gainwelltechnologies.com</u> .	n, click the I, please			
Sign In				
This link expires in 5 minutes. Can't use the link? Enter a code instead: 880762				

Figure 11 One-Time Verification Code Email

10. The user can choose to one of the following:

- Click the **Sign In** link in the email.
- Capture the verification code in the email, return to the browser window and click Enter a verification code instead. Enter the code from the email, and click **Verify**.

ForwardHealth				
Verify with your email				
() PORTALUSERI				
We sent an email to g***I@wisconsin.gov. Click the verification link in your email to continue or enter the code below.				
Enter Code				
Verify				
Back to sign in				

Figure 12 Verify With Your Email Box

The OnBase Document Retrieval screen will be displayed.



Figure 13 OnBase Document Retrieval Screen

### 6 Creating and Submitting a Children's Long-Term Support Rate Setting Outlier Request

This functionality allows the user to create and submit a CRSOR for review.

1. Click the menu icon in the top left corner of the OnBase Document Retrieval screen.

Document Retrieval	<b>OnBase</b>	☆	CRSORBROWN CRSORBROWN 🗸
Documen Types			
RECIPIENT DATA MAINTENANCE			
ELG Child Rate Setting Outlier Request Addi tional Doco - PHI			
ELG Child Rate Setting Outlier Request For m - PHI			
ELG Child Rate Setting Outlier Request For			
0 SELECTED			
Document Date			
	Nothing to display	,	
Search Type	······································		
KEYWORDS NOTES			
() Full-Text Search			
🕑 🆧 🐱 Search			

Figure 14 OnBase Document Retrieval Screen—Menu Icon

2. A menu of options will be displayed on the left side of the screen. Select **New Form**.

× Document Retrieval	OnBase	☆	CRSORBROWN CRSORBROWN 🗸
DOCUMENT			
Document Retrieval			
Custom Queries	î l		
New Form			
Import Document			
Documents Checked Out	•		
WORKFLOW			
Open Workflow	: (	(i)	
USER	Nothing	g to display	
Locked Objects			

Figure 15 OnBase Document Retrieval Screen—New Form

Available forms will be listed under the Forms menu on the left side of the screen.

New Form	<b>OnBase</b>	☆	CRSORBROWN CRSORBROWN V
Forms Q RECIPIENT DATA MAINTENANCE CLTS Rate Setting Outlier Request (CRSO R)			
		ay	

Figure 16 OnBase New Form Screen

3. Click CLTS Rate Setting Outlier Request (CRSOR). A blank CRSOR will be displayed.

New Form	<b>OnBase</b>	CRSORBROWN CRSORBROWN
Forms Q RECIDIENT DATA MAINTENANCE	CLTS Rate Setting Outlier Request	(CRSOR)
CLTS Rate Setting Outlier R equest (CRSOR)	County* Administrative Support Support Organization*	ubmission ID Submission Date 212 07/21/2023
	Participant Information Participant MCI* Participant First Name* P Clear Participant	articipant Last Name * Participant DOB *
:	County Waiver Agency Information	
:	County Waver Agency Name*	Submitter Name*
	Approver Name*	Approver Email *
	CC Email Address (separate each address with a comma)	
	CLTS Outlier Request	
	Service Category * Federal Procedure Code *	Review Determination
	Individual Care Need* CLTS Rate Schedule Amt*	DHS Representative DHS Determination Date
	Billing Provider Name* Outlier Request Rate Amt*	
	Billing Provider Tax ID* Outlier Request Unit Type*	
	Requested per Week*	
I		
	CRSOR Provider Form (0)	
	Document Name Attachmen Available Attachment Types CRSOR Provider Form Y Attach	t Type Actions
	DHS Notes	bbA
	CWA Notes	Add
	Submit	

Figure 17 CLTS Rate Setting Outlier Request (CRSOR)

- 4. At the top of the CRSOR, select information for the following fields:
  - County\*—Select the county from the drop-down menu.
  - Administrative Support Organization\*—This field indicates whether the user is an employee of an administrative support organization. If the user submitting the CRSOR is an employee of an administrative support organization, the appropriate administrative support organization should be selected from the drop-down menu. County workers should select "N/A."
- 5. Search for the participant by entering the Participant Master Client Index (MCI) number and then clicking the County Waiver Agency Name\* drop-down menu. This will trigger a search query in interChange. The form will not allow input in any fields until the query is complete. The visual clue that the query is complete is that the County Waiver Agency Name\* field will present values in its drop-down menu. When this happens, inspect the Participant Information fields.
  - If only one participant is found, the Participant First Name\*, Participant Last Name\*, and Participant DOB\* fields will be automatically filled.
  - If multiple participants are found, a table will be displayed listing the participants. Select the appropriate participant.
  - If no participant is found, nothing will appear in the Participant First Name\*, Participant Last Name\*, or Participant DOB\* fields. Do not manually enter values. Verify the correct Participant MCI was entered. Click **Clear Participant** to do a new search. Note: OnBase will not allow a CRSOR to be submitted without a participant identified.
  - The **Clear Participant** button will clear out all values in the Participant Information fields.
- 6. Under the Count Waiver Agency Information panel, enter or select information for the following fields. Note: All fields with an asterisk are required.
  - County Waiver Agency Name\*—Select the CWA name from the drop-down menu. Note that administrative support organizations are listed by their name and then the county they serve.



Figure 18 County Waiver Agency Information

• Submitter Name\*—Enter the name of the person submitting the form.

• Submitter Email\*—Enter the email of the person submitting the form. Note: If a participant was not found by the search query, error messages will appear at the top of the form.

	OnBase <sup>®</sup>		☆	CRSORBROWNAPP CRSORBROWNAPP ~	
A Participant First Name Participant no A Participant DOB Participant not foun A Participant Last Name Participant no	ot found. Enter a valid Participant MCI. d. Enter a valid Participant MCI. t found. Enter a valid Participant MCI.				Î
CLTS Rate Setting	Outlier Request (CF	RSOR)			
County*	Administrative Support Organization*	Submission ID 1229		Submission Date 10/12/2023	
Participant Information					l
Participant MCI* 1123456787 Clear Participant	Participant First Name	Participant Last Name		Participant DOB	
County Walver Agency Inform	nation				l
County Walver Agency Name* BROWN CO HUMAN SERVICES DE	PT V	Submitter Name* Jane Doe			1
Submitter Email •		Submitter Phone Nun	nber*		
Approver Name*	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	Approver Email	~~~~_		J

Figure 19 CLTS Rate Setting Outlier Request (CRSOR)—Error Messages

- Submitter Phone Number\*—Enter the phone number of the person submitting the form.
- Approver Name\*—Enter the name of the person authorized to approve CRSORs for the organization.
- Approval Email\*—Enter the email of the person authorized to approve CRSORs for the organization.
- CC Email Address (Separate each email address with a comma.)—Enter any cc email addresses with each address separated by a comma. CC email addresses will receive a copy of notification emails when any activity on the CRSOR occurs, including DHS determination.
- 7. Under the CWA panel, enter or select information for the following fields:
  - Service Category\*—Select the service category from the drop-down menu.
  - Federal Procedure Code\*—Select the federal procedure code from the drop-down menu.
  - Individual Care Need\*—Select "Yes" if the CRSOR is being submitted due to the participant's exceptional individual care needs or "No."

- CLTS Rate Schedule Amt\*—Enter the CLTS rate schedule amount using the most current CLTS Waiver Program Rate Schedule and CLTS Program Benefit Code Crosswalk.
- Provider Access\*—Select "Yes" if the CRSOR is being submitted due to provider access issues or "No."
- CLTS Rate Unit Type\*—Select the CLTS rate unit type from the drop-down menu. The unit rate type must match the federal procedure code.
- Billing Provider Name\*—Enter the billing provider's name.
- Outlier Request Rate Amt\*—Enter the outlier request rate amount.
- Billing Provider Tax ID\*—Enter the billing provider's tax ID number.
- Outlier Request Unit Type\*—Select the outlier request unit type from the drop-down menu. Unit rate type must match the federal procedure code.
- Rendering Provider Name\*—Enter the rendering provider's name. This could be the same as the Billing Provider Name or an Individual Family-Chosen Provider Name when the Billing Provider is a Financial Management Services Agency.
- Number of Units Requested per Week\*—Enter the number of units requested per week.
- Rationale for Outlier\*—Enter the rationale for the outlier in the free text box. Text is limited to 1,000 characters. If more space is needed, the user can add additional details to a Word document and attach it to the CRSOR.
- 8. All fields in the DHS panel are read-only and cannot be modified.
- 9. To attach any documents to the form, such as the CLTS Provider Cost-Based Outlier form, F-02538A, select the type of document to be attached from the drop-down menu under the CRSOR Provider Form panel. The default value is CRSOR Provider Form. If anything other than a provider form is to be attached, select "Additional Documentation."

CRSOR Provider Form (0)		
Document Name	Attachment Type	Actions
Available Attachment Types CRSOR Provider Form	Attach	
Additional Documentation		
DHS Notes		Add

Figure 20 CRSOR Provider Form Option

10. Click **Attach**. A File Explorer window will appear. Navigate to the desired document, select it, and click **Open**.

New Form	OnBase	CRSORBROWN CRSORBROWN V
Open ← → ~ ↑ ■ « Gregg Hammill > 1889_OnBase Workfl	ow_CLTS User Guides → Documents v 친 /P Search Documents	× DHS Determination Date
Organize  New folder  Recordings  This PC  Dosktop  Documents  Documents  Downloads  Music  Fictures  Videos  Videos  File name:  File name:		
	CRSOR Provider Form (0) Document Name Available Attachment Types CRSOR Provider Form Attach DHS Notes	Actions
	Submit	Add

Figure 21 CLTS Rate Setting Outlier Request (CRSOR)—CRSOR Provider Form Panel

11. The attachment will be uploaded and appear as a link in the CRSOR Provider Form panel. The link can be removed, if necessary, by clicking **Remove**.

■ New Form	OnBase	☆ CRSORBROWN CRSORBROWN ✓
Forms Q RECIPIENT DATA MAINTENANCE CLTS Rate Setting Outlier Request (CRSO R)	Individual Care Need*       CLTS Rate Schedule Amt*         Image: CLTS Rate Unit Type*         Provider Access*       CLTS Rate Unit Type*         Image: CLTS Rate Unit Type*	epresentative DHS Determination Date
	CRSOR Provider Form (1) Document Name (Pending) Provider Request Form.xlsx Available Attachment Types CRSOR Provider Form Attach DHS Notes CWA Notes Submit	Attachment Type Actions CRSOR Provider Form [Remove] Add

Figure 22 CLTS Rate Setting Outlier Request (CRSOR)—Document Uploaded

12. The user can add a note by clicking the **Add** button in the CWA Notes panel to bring up the free text box under the CWA Note Description\* field.

CWA User CRSORBROWN CRSORBROWN	CWA Note Created Date 07/21/2023 03:39:11 PM	
CWA Note Description *		Remov
Adjusting to individual living.		
		<u>//</u>

Figure 23 CLTS Rate Setting Outlier Request (CRSOR)—CWA Notes Panel

- 13. Click **Submit**. If any required field is missing values, error messages will appear at the top of the screen. If there are no issues, the CRSOR will be submitted to the CWA Approver identified in the CRSOR for review. A popup box will appear asking the user if another form is to be created. Select "Yes" to create another CRSOR, or select "No."
- 14. A CRSOR09 email notification will be sent to inform the CWA Approver that a CRSOR needs to be reviewed.

From: WI-OnBase-MOD@dcs-usps.com         Sent: Wednesday, August 23, 2023 10:14 PM         To: CWA APPROVER < <u>Idoe@crawfordcounty.wi.gov</u> >         Subject: ACTION REQUIRED: A CRSOR has been submitted for Approver review - CRSOR ID: 1190
This CRSOR is ready for review. Please review and then take the appropriate action:
<ul> <li>If the application is accurate and complete, use the 'Submit to DHS' button to send the CRSOR to DHS for determination</li> <li>If corrections or additional information is needed, add a CWA Note, save the form and then use the 'Return to submitter' button to send the CRSOR back to the Submitter for editing.</li> </ul>
Submission ID : 1190
Participant : JG8901
Submitter Name : Mike Smith
CWA Name : CRAWFORD CO HUMAN SERVICES
Use <u>this link</u> to access the CRSOR. Notification #: CRSOR09

Figure 24 Submitted to Approver Email—CRSOR09

#### 7 County Waiver Agency Approver Queue

The CWA Approver assumes control of the CRSOR in the CWA Approver Review queue.

1. Click the link from the email notification to open OnBase.



Figure 25 Approver Review Email With Link

- 2. Go through the authentication and login process detailed in the <u>Accessing the Children's</u> <u>Long-Term Support Rate Setting Outlier Request Processing Application</u> chapter. Proceed to <u>Step 4</u>.
- 3. The Approver can also manually navigate to the screen by using the following steps.
  - a. Login to the ForwardHealth Portal and click the link on the secure Waiver Agency page to open OnBase.
  - b. Go through the authentication and login process detailed in the <u>Accessing the Children's</u> <u>Long-Term Support Rate Setting Outlier Request Processing Application</u> chapter.

c. OnBase will appear showing the Document Retrieval Screen. Click the menu icon in the top left corner.

S OnBase Model Office 20.3.33.10° × +			∨ – □ X
← → C      moonbaseweb1.dev.healthcare.wi.le	ocal/OBWeb/NavPanel.aspx		🖻 🖈 🗯 🖬 😩 🗄
Document Retrieval	<b>OnBase</b>	☆	CRSORBROWNAPP CRSORBROWNAPP V
Document Types Q PECIPIENT DATA MAINTENANCE			
ELG Child Rate Setting Outlier Request Addi tional Doco - PHI			
<ul> <li>ELG Child Rate Setting Outlier Request For m - PHI</li> </ul>			
ELG Child Rate Setting Outlier Request For m Complete - PHI			
ELG Child Rate Setting Outlier Request Provi der Form - PHI			
1 SELECTED			
Desument Data			
K			
Search Type			
KEYWORDS NOTES			
CRSOR County =			
CRSOR Submission ID =			
CRSOR Submission Date =			
MM/dd/yyyy			
CRSOR County Assist =			
CRSOR Participant MCI =			
CRSOR Participant First Name =			
Full-Text Search			
🕑 🖗 🎚 Search			

Figure 26 OnBase Document Retrieval Screen

d. A menu of options will be displayed on the left side of the screen. Hold down the Ctrl key and click **Open Workflow** to make another tab appear in the same browser.

× Document Retrieval	<b>OnBase</b>	☆	CRSORBROWNAPP CRSORBROWNAPP 🗸
DOCUMENT			
Document Retrieval			
Custom Queries			
New Form			
Import Document			
Documents Checked Out			
WORKELOW			
Open Workflow			
USER			
Locked Objects			

Figure 27 OnBase Document Retrieval Screen—Open Workflow

The OnBase processing screen will be displayed.

OnBase 🗘 🗘 🖬 🛏	Indox
LIFE CYCLE VIEW WORK FOLDER ☐ Combined Inbox > ∞ CLTS RSOR Processing	
	Please Select an Item

Figure 28 OnBase Processing Screen

e. Expand the CLTS RSOR Processing Lifecyle by clicking the arrow next to the CLTS RSOR Processing icon.

f. Click on the **CWA Approver Review** queue link. Links to all of the CRSORs in the queue will be displayed in the Inbox panel.

OnBase 🙀 🛱 🖛	Inbox	G
	Drag a column header here to group by that column.	
•• ¥ 1	NAME	ENTRY DATE
LIFE CYCLE VIEW WORK FOLDER	▽ Contains	⊽ 0n
🖧 Combined Inbox	CRSOR Form: BROWN - 1186 - JAMES GATES - 6/15/2023	7/6/2023 5:43:52 PM
v of CLTS RSOR Processing	CRSOR Form: DANE - 1212 - ABC SMIT - 7/21/2023	7/21/2023 3:41:15 PM
CWA Approver Review		
🚞 CWA Rework		
	Items: 2	
	Submit Return to Cancel	

Figure 29 OnBase Processing Screen With Links to CRSORs

4. Click the desired CRSOR link and the CRSOR will be displayed in the bottom half of the screen.

OnBase 🔅 🙀 🖬 🛏	Inbox				G
	Drag a column header here to group by the NAME	at column.		ENTRY DATE	
LIFE CYCLE VIEW WORK FOLDER	♡ Contains			∽ On	· 'I
	CRSOR Form: BROWN - 1186 - JAM	IES GATES - 6/15/2023		7/6/2023 5:43:52 PM	_
	CRSOR Form: DANE - 1212 - ABC SI	MIT - 7/21/2023		7/21/2023 3:41:15 PM	
No increa to display					
No items to display					
Items: 0	Items: 2				_
Template: None	to DHS 🚿 Submitter 🥨 Carro				
					<b>^</b>
CLTS Rate Setting Out	lier Request (CRSOR	R)			- 11
County*	dministrative Support Organization*	Submission ID	Submission Date		18
DANE	N/A	1212	07/21/2023		
			L		
Participant Information					
Participant MCI*	Participant First Name *	Participant Last Name*	Participant DOB*		
0123456789	ABC	SMIT	01/08/1983		
Clear Participant					
<b>County Waiver Agency Information</b>					
County Wayer Agency Name*		Submitter Name*			
BROWN CO HUMAN SERVICES DEPT	•	John Doe			
Submitter Email *		Submitter Phone Number*			
jdoe@gmail.com		(608) 888-8787			
Approver Name*		Approver Email *			
0 Note(s)					

Figure 30 OnBase Processing Screen With CRSOR

5. If changes are made to the entries on the form, click the **Save** button at the bottom of the form.

6. After reviewing the CRSOR, the Approver can choose from the following three action buttons located at the bottom of the inbox.

OnBase 🗘 🗘 🖬 🖛	Inbox
	Drag a column header here to group by that column.
LIFE CYCLE VIEW WORK FOLDER	NAME
	CRSOR Form: BROWN - 1186 - JAMES GATES - 6/15/2023
	CRSOR Form: DANE - 1212 - ABC SMIT - 7/21/2023
No items to display	
Items: 0 Template: None	Items: 2 Submit & Return to Cancel

Figure 31 OnBase Processing Screen—Action Buttons

• Submit to DHS—Selecting Submit to DHS sends the CRSOR to DHS for determination. This generates the CRSOR01 email notification which is sent to the Submitter, Approver, and CC addressees on the CRSOR. The CRSOR02 email notification is sent to DHS.

CLTS Outlier Request was submitted - CRSOR ID: 1182					
WI-OnBase-MOD@dcs-usps.com	$\textcircled{\begin{tabular}{ c c c c } \hline \hline$				
Cc O DAMON.DIEHL@WISCONSIN.GOV	Tue 6/13/2023 2:47 PM				
This notification is to acknowledge that DHS has received your CLTS Outlier Request.					
Submission ID : 1182					
Participant : JG8901					
Submitter Name : Jane Doe					
DHS will make a determination on your request or contact you for additional information if needed. New notifications will be sent to you when this occurs. Notification #: CRSOR01					

Figure 32 CRSOR Submittal Confirmation—CRSOR01 Sent to Submitter, Approver, and CC Addressees

ACTION REQUIRED: A new Outlier Request has been received - CRSOR ID: 1182						
WI-OnBase-MOD@dcs-usps.com To ODE, JOHN; • Smith, JP			Keply All	$\rightarrow$ Forward	ij	
				Tue 6/1	3/2023 2	:47 PM
A new CRSOR has entered the DHS DETERMINATION queue.						
Submission ID : 1182						
Participant : JG8901	Participant : JG8901					
Submitter Name : Jane Doe						
CWA Name : BROWN CO HUMAN SERVICES DEPT						
Use this link to access the CRSOR.						
Notification #: CRSOR02						

Figure 33 CRSOR Entered DHS Determination Queue Email—CRSOR02 Sent to DHS

• **Return to Submitter**—Selecting **Return to Submitter** moves the CRSOR to the CWA Edit queue and generates the CRSOR10 email notification, which is sent to the Submitter and CC addressees on the CRSOR. The Approver should add a CWA Note to explain why the CRSOR is being returned before using this button.

ACTION REQUIRED: A CRSOR requires editing - CRSOR ID: 1181					
WI-OnBase-MOD@dcs-usps.com	$\odot$		Keply All	$\rightarrow$ Forward	<b>ii</b>
To ODE, JOHN				Tue 6/1	13/2023 2:58 PM
The Approver has returned this CRSOR for editing.					
Submission ID : 1181					
Participant : AS6789					
Submitter Name : Jane Doe					
CWA Name : BROWN CO HUMAN SERVICES DEPT					
Use this link to access the CRSOR.					
Notification #: CRSOR10					

Figure 34 Approver Returned to Submitter Email—CRSOR10 Sent to Submitter and CC Addressees

• **Cancel**—Selecting **Cancel** deletes the CRSOR from OnBase.

## **8 County Waiver Agency Edit Queue**

The CWA Edit queue allows the Submitter address any comments from the CWA Approver, edit the CRSOR and then move it back to the CWA Approver Review queue. The Approver also has the ability to perform these actions in this queue.

1. Click the link from the email notification to access the CRSOR that has been returned.



Figure 35 Approver Review Email With Link

2. Go through the authentication and login process detailed in the <u>Accessing the Children's</u> Long-Term Support Rate Setting Outlier Request Processing Application chapter.

#### The CRSOR will be displayed.

OnBase 🔅 🙀 🖬 🖛	Inbox				G
ПС▼	Drag a column header here to group by tha	it column.			
	NAME			ENTRY DATE	- 4
LIFE CICLE VIEW WORK POLDER	♥ Contains			∀ On	
	CRSOR Form: CRAWFORD - 1204 - J	ERRY ROSE - 7/5/2023		7/5/2023 10:45:52 PN	1
	CRSOR Form: DANE - 1212 - ABC SM	ИТ - 7/21/2023		7/21/2023 4:08:45 PM	1
No items to display					
	Items: 2				
Items: 0	Send to CWA				
Template: None	Approver				
<b>CLTS Rate Setting Out</b>	lier Request (CRSOR	)			- 11
		•			- 11
County* A	dministrative Support Organization*	Submission ID	Submission Date		
DANE	V/A	1212	07/21/2023		
Participant Information					
Participant MCI*	Participant First Name *	Participant Last Name*	Participant DOB*		
0123430789	ADC		01/08/1985		
Clear Participant					
					-
County Waiver Agency Information					
County Waver Agency Name*		Submitter Name*			
BROWN CO HUMAN SERVICES DEPT	•	John Doe			
Submitter Email *		Submitter Phone Number*			
jdoe@gmail.com		(608) 888-8787			
Approver Name*		Approver Email *			
0 Note(s)					<b>_</b>
o mote(s)					

Figure 36 CWA Edit Screen

3. The Submitter can make the necessary changes to the CRSOR and add text to the CWA Notes panel. Changes must be saved using the **Save** button at the bottom of the CRSOR before using the **Send to CWA Approver** action button.

4. Click the **Send to CWA Approver** button to move the CRSOR back to the CWA Approver Review queue.



Figure 37 OnBase Processing Screen – Send to CWA Approver

This will generate the CRSOR11 email notification, which is sent to the Approver.

ACTION REQUIRED: A CRSOR has been edited - CRSOR ID: 1181					
WI-OnBase-MOD@dcs-usps.com	$\bigcirc$ ← Reply ← Reply All → Forward $\bigcirc$				
The Submitter has edited this CRSOR and it is ready for review and approval, again. If there are issues, add a CWA Note and then use the Reject button to send the CRSOR back to the Submitter for editing.					
Submission ID : 1181					
Participant : AS6789					
Submitter Name : Jane Doe					
CWA Name : BROWN CO HUMAN SERVICES DEPT					
Use <u>this link</u> to access the CRSOR.					
Notification #: CRSOR11					

Figure 38 Edited CRSOR Email—CRSOR11 Sent to Approver

#### 9 Department of Health Services Determination Queue

Once the CRSOR is submitted by the Approver, it is moved to the DHS Determination queue where CRSORs are reviewed by DHS. DHS will take one of three actions:

- Send the CRSOR back to the Submitter for additional information. This is the <u>CWA Rework</u> <u>queue</u>.
- Put on hold while internal decisions are made. This is the DHS Hold queue.
- Finalize a determination and remove the CRSOR from the workflow.

#### **10 County Waiver Agency Rework** Queue

The CWA Rework queue allows the Submitter to address any comments from DHS, edit the CRSOR, attach additional documentation when applicable, and then move it back to the DHS Determination queue.

1. Click the link from the email notification to access the CRSOR that has been returned.

ACTION REQUIRED: A CLTS Outlier Requ	uest needs more information - CRSOR ID: 1166
WI-OnBase-MOD@dcs-usps.com To ODE, JOHN Cc OJOHN.DOE@WISCONSIN.GOV	$\bigcirc$ $\bigcirc$ Reply $\checkmark$ Forward $\boxed{0}$ Fri 6/9/2023 10:59 AM
A CLTS Outlier Request has been returned for addition see what is missing.	al information. Please review the DHS Notes field in the request to
Submission ID : 1166	
Participant : JG8901	
Billing Provider Name : XYZ Clinic	
Use this link to access the CRSOR.	
Notification #: CRSOR03	

Figure 39 CRSOR Returned to Submitter Email Sent to Submitter and CC Addressees

2. Go through the authentication and login process detailed in the <u>Accessing the Children's</u> Long-Term Support Rate Setting Outlier Request Processing Application chapter. The CWA Rework queue will be displayed.

	A	Inhav		-
		Introv       Drag a column header here to group by that column.       NAME       ♥ Contains       ♥	NTRY DATE	
No items	to display	CRSOR Form: BROWN - 1170 - JERRY ROSE - 5/26/2023 6	/14/2023 3:	24:13 PM
ms: 0 Templat Available Attachr CRSOR Provider	e: None ment Types Form v Attu	Items: 1 Send DHS DHS		
DHS Notes				Add
DHS User CRSORDHSUSE DHS Note Desc	R2 ription * 5150 requires proof of	DHS Note Created Date 06/14/2023 03:22:54 PM Provider certification.	1	Remove

Figure 40 CWA Rework Queue

- 3. The Submitter should check the DHS Notes panel to learn what the issue is.
- 4. Make any necessary correction(s), click the **Save** button, and then click the **Send to DHS** button to move the CRSOR back to the DHS Determination queue.

Note: CRSORs sitting in the CWA Rework queue for extended periods will generate the following responses:

- A CRSOR sitting in the CWA Rework queue for seven days will generate a CRSOR05 email notification to be sent to the Submitter, Approver, and the CC addressees to warn them.
- A CRSOR sitting in the CWA Rework queue for 14 days will generate a CRSOR06 email notification to be sent to the Submitter, Approver, and the CC addressees to remind them.
- A CRSOR sitting in the CWA Rework queue for 21 days will generate OnBase to move the CRSOR back to the DHS Determination queue. DHS will archive the CRSOR by denying it for lack of necessary information. The CRSOR cannot be reopened after denial. A new CRSOR must be submitted.

#### 11 Final Determination on a Children's Long-Term Support Rate Setting Outlier Request

DHS will make one of three final determinations on a CRSOR:

- Approved as requested.
- Approved with modified rate.
- Denied.

Finalizing a determination removes the CRSOR from the workflow. The CRSOR is reclassified in OnBase as a Completed CRSOR and separated from the CRSORs still under determination. This also generates a CRSOR07 email notification which is sent to the Submitter, Approver, and CC addressees indicating a final determination has been rendered by DHS.

1. Click the link in the email notification to access the completed CRSOR.

DECISION: DHS has rendered a decision on a CLTS Outlier Request - CRSOR ID: 1167						
WI-OnB To ODO Cc O JOI	ase-MOD@dcs-usps.com E, j0HN HN.DOE@WISCONSIN.GOV	☺     ∽   <				
DHS has finalized a	determination regarding a CLTS Outlier Request.					
Submission ID	: 1167					
Participant	: 1980					
Billing Provider Nar	ne : XYZ Clinic					
Determination : Approved as Requested						
Use this link to access the CRSOR.						
Notification #: CRSOR07						

Figure 41 DHS Final Determination Email Sent to Submitter, Approver, and CC Email Addressees

2. Go through the authentication and login process detailed in the <u>Accessing the Children's</u> Long-Term Support Rate Setting Outlier Request Processing Application chapter.

The Completed CRSOR will be displayed. Note: All fields are read-only and action buttons are disabled.

CLTS Rate Setting Outlier Request (CRSOR)					
County* BROWN	Administrative Support Organization*	Submission ID 1184	Submission Date 06/13/2023		
Participant Information					
Participant MCI* 1234567890	Participant First Name *	Participant Last Name* PARTICIPANT	Participant DOB* 08/09/1978		
County Walver Agency Informati	on				
County Waver Agency Name* BROWN CO HUMAN SERVICES DEPT	Y	Submitter Name* John Doe			
Submitter Email * jdoe@gmail.com		Submitter Phone Number* (608) 444-4444			
Approver Name*		Approver Email			
Jane Doe		janedoe@gmail.com			
CC Email Address (separate each add	ress with a comma)				
JOHN.DOE@WISCONSIN.GOV			h		
CLTS Outlier Request					
CWA Section		DHS Section			
Service Category*		Review Determination	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		

Figure 42 Completed CRSOR

#### 12 Finding and Viewing Completed Children's Long-Term Support Rate Setting Outlier Requests

1. To view Completed CRSORs without using email links, log in to OnBase via the Portal following the steps from the <u>Accessing the Children's Long-Term Support Rate Setting Outlier</u> <u>Request Processing Application</u> chapter of this user guide.

The OnBase Document Retrieval screen will be displayed.

Document Retrieval	<b>OnBase</b>	🟫 🛛 CRSORBROWN CRSORBROWN 🗸
Document Retrieval  Document Types  RecIPIENT DATA MAINTENANCE  ELG Child Rate Setting Outlier Request Additional Doco - PHI ELG Child Rate Setting Outlier Request Form - PHI ELG Child Rate Setting Outlier Request Form Complete - PHI ELG Child Rate Setting Outlier Request Provider Form - PHI O SELECTED  Document Data	OnBase <sup>•</sup>	CRSORBROWN CRSORBROWN ~
Search Type KEYWORDS NOTES		Dothing to display
Full-Text Search		

Figure 43 OnBase Document Retrieval Screen—Default View

The CRSOR document types are as follows:

- ELG Child Rate Setting Outlier Request Additional Doco—PHI are documents attached to CRSORs other than the CLTS Provider Cost-Based Outlier form, F-02538A.
- ELG Child Rate Setting Outlier Request Form—PHI are CRSORs that are in progress.
- ELG Child Rate Setting Outlier Request Form Complete—PHI are CRSORs that have been finalized.

- ELG Child Rate Setting Outlier Request Provider Form—PHI are CLTS Provider Cost-Based Outlier forms, F-02538A, attached to CRSORs.
- 2. Select the document type. Keywords will be listed under the **Search Type** section to help restrict search results. Use the scroll bar to see all of the available keywords. Note: The Keywords have Boolean operators (equal to, greater than, less than, etc.). The user can enter a date range and/or keywords (County, Submission ID, Participant MCI, etc.). If the user is searching for a specific document, the Submission ID is the best keyword. This will return one CRSOR in the search results.

Document Retrieval	<b>OnBase</b>	🟫 CRSORBROWN CRSORBROWN 🗸
Document Types		
RECIPIENT DATA MAINTENANCE ELG Child Rate Setting Outlier Request Additional Doco - PH ELG Child Rate Setting Outlier Request Form - PHI CLG Child Rate Setting Outlier Request Form Complete - PHI ELG I wild Rate Setting Outlier Request Provider Form - PHI 1 SELECTED	· ·	
Document Date		
<	:	$\widehat{\mathbf{G}}$
Search Type	:	Nothing to display
KEYWORDS NOTES		
CRSOR County	=	
CRSOR Submission ID	•	
CRSOR Submission Date	·	
MM/dd/yyyy		
CRSOR County Assist		
CRSOR Participant MCI UI-Text Search	- •	
🕒 🕼 🎚 Search		

Figure 44 OnBase Document Retrieval Screen—Select Document Type

3. Click **Search**. Results will be displayed under the Document Search Results pane. The search results in the example below show a query where a date range and county were selected.

Document Retrieval			OnBase CRSORB	ROWN CRSORBROWN 🗸
Document Types Q RECIPIENT DATA MAINTENANCE ELG Child Rate Setting Outlier Request Additional Doco - PH- ELG Child Rate Setting Outlier Request Form - PHI CLG Child Rate Setting Outlier Request Form Complete - PH ELG Child Rate Setting Outlier Request Provider Form - PHI 1 SELECTED	↓      ↓		Document Search Results Drag a column header here to group by that column. DOCUMENT NAME	C DOCUMENT DATE ⊽ 0n 6/26/2023 6/22/2023 6/22/2023
Document Date 06/01/2023 - 07/14/2023 - < Search Type KEYWORDS NOTES		-	CRSOR Completed Form: BROWN - 1188 - JAMES DOE - 6/22/2023 CRSOR Completed Form: BROWN - 1185 - JAMES DOE - 6/15/2023 CRSOR Completed Form: BROWN - 1184 - JOHNNY JOHNSON - 6/13/2023 Items: 11	6/22/2023 6/15/2023 6/13/2023
CRSOR County BROWN CRSOR Submission ID CRSOR Submission Date	= ^ =			
CRSOR County Assist CRSOR Participant MCI Full-Text Search	-		Please Select an Item	

Figure 45 OnBase Document Retrieval Screen—Search Results

4. Double-click on a link in the search results and the CRSOR will be displayed in the viewer pane below the search results. Note: The CWA can contact DHS via email at dhscltsrateoutlier@dhs.wisconsin.gov if they believe an error was made during finalization of the CRSOR. If DHS determines that the CRSOR was finalized in error, DHS can pull the CRSOR out of its completed status and the CRSOR will go through the final determination process again. This will result in another CRSOR07 email.

Document Types       Document Spess         Q       Document Search Results         RECIPIENT DATA MAINTENANCE       ELG Child Rate Setting Outlier Request Additional Doco - PHI         ELG Child Rate Setting Outlier Request Form Onplete - PHI       Child Rate Setting Outlier Request Form Onplete - PHI         V       ELG Child Rate Setting Outlier Request Form Onplete - PHI         ELG Child Rate Setting Outlier Request Form Onplete - PHI       Containa         V       ELG Child Rate Setting Outlier Request Form Onplete - PHI         ELG Child Rate Setting Outlier Request Form Onplete - PHI       CRSOR Completed Form BROWN - 1192 - 6/26/2023         Document Date       CRSOR Completed Form BROWN - 1191 - JOHNNY JOHNSON - 6/22/2023         Document Date       CRSOR Completed Form BROWN - 1184 - JOHNNY JOHNSON - 6/13/2023         CRSOR County       =         BROWN       =         CRSOR Submission Date       =         Items: 11       Current Search         CRSOR County       =         GRSOR Submission Date       =         Immoder       =         CRSOR County Assist       =         Items: 1       Current Search         Items: 1       Submission Date         Immoder       =         CRSOR County Assist       =         Immoder<	Document Retrieval		OnBase CRSORBROWN CRSORBROWN ~
CRSOR Submission ID = CRSOR Submission Date = MM/dd/yyyy CRSOR County Assist = Participant MCl = Participant Last Participant Last Participant DOB*	Document Types Q RECIPIENT DATA MAINTENANCE ELG Child Rate Setting Outlier Request Additional Doco - PH ELG Child Rate Setting Outlier Request Form - PHI ✓ ELG Child Rate Setting Outlier Request Form Complete - PH ELG Child Rate Setting Outlier Request Provider Form - PHI 1 SELECTED Document Date 06/01/2023 □ - 07/14/2023 □ < Search Type <u>KEYWORDS</u> NOTES CRSOR County BROWN	* ^ *	Document Search Results         Drag a column header here to group by that column.         DOCUMENT NAME         ♥ Contains         ♥ Contains         © CRSOR Completed Form BROWN - 1192 - 6/26/2023         CRSOR Completed Form BROWN - 1191 - JOHNNY JOHNSON - 6/26/2023         CRSOR Completed Form BROWN - 1191 - JOHNNY JOHNSON - 6/26/2023         CRSOR Completed Form BROWN - 1190 - JAMES DOE - 6/22/2023         CRSOR Completed Form BROWN - 1180 - JAMES DOE - 6/22/2023         CRSOR Completed Form BROWN - 1185 - JAMES DOE - 6/15/2023         CRSOR Completed Form BROWN - 1185 - JAMES DOE - 6/15/2023         CRSOR Completed Form BROWN - 1185 - JAMES DOE - 6/15/2023         CRSOR Completed Form BROWN - 1185 - JAMES DOE - 6/15/2023         CRSOR Completed Form BROWN - 1184 - JOHNNY JOHNSON - 6/13/2023         Items: 11
01234567890 Name* Name*	CRSOR Submission ID CRSOR Submission Date MM/dd/yyyy CRSOR County Assist CRSOR Participant MCI ① Full-Text Search	= = =	County* Administrative BROWN V Support Organization* Lutheran Social Ser V Participant Information Participant MCI* Participant First Name* Participant DOB*

Figure 46 OnBase Document Retrieval Screen—Completed CRSOR

#### 13 Searching for Children's Long-Term Support Rate Setting Outlier Requests Approaching Their Expiration Date

Users can search for CRSORs that are approaching their expiration date so they can submit new requests by using the following steps.

- 1. From the OnBase Document Retrieval screen, select the ELG Child Rate Setting Outlier Request Form Complete—PHI document type.
- 2. Input a date in the **CRSOR Approval Expiration Date** keyword field and change the Boolean operator symbol to greater than (>).



Figure 47 Document Retrieval Screen

- 3. Click **Search**. Completed CRSORs meeting the search criteria will be listed in the Document Search Results pane.
- 4. Highlight the results, right-click, and select **Generate CSV File** from the drop-down menu.

A pop-up box will appear allowing the user to make more choices. Enter a name for the report.

Generate CSV File		$\times$
REPORT NAME		
CRSORS due to expire in 30 day	s	
DOCUMENTS		
<ul> <li>Include only the selected do</li> </ul>	ocument(s)	
<ul> <li>Include all documents</li> </ul>		
COLUMNS		
🗹 Document Name	Document Type	
Document Date	Document Handle	
Date Stored		
Time Stored		
KEYWORDS		
All		
O Common		
O None		
	<b>/</b>	
	Generate Canc	el

Figure 48 Generate CSV File Pop-up Box

5. Click Generate. A file in CSV format will download to the Downloads folder.

6. Navigate to the Downloads folder and double-click the file to open it. Note: The columns may need to be expanded to view all of the data, but the data should be separated correctly by cell. Column R is the Approval Expiration Date. Use the dates in that column to identify and remove rows that are not of interest (too far in the future).

Aut	oSave 🧿		<b>%</b>	°§ • ⊵	∋ ≂ (	CRSORS_exp	iring_After_1	_Aug_2024 ·		O Search						Œ			×
File	Hom	ne Inse	rt Dra	aw Page	Layout	Formulas	Data	Review	View	Automat	e Help				ç	Comm	ients	🖻 Shar	e
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Clipb	oard 🖓		Font	t	F <sub>3</sub>	Align	ment	r <u>s</u> i	Number	۲ <sub>2</sub>		Styles		Cells	Editing	Analys	is Sei	nsitivity	^
()	(j) POSSIBLE DATA LOSS Some features might be lost if you save this workbook in the comma-delimited (.csv) format. To preserve these features, save it in an Excel file format. Don't show again Save As ×												×						
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	E	F	G	н	L I	J	ĸ	L	м	N	0	P	Q		R		s	т	
1 10	RSOR Co	CRSOR Pa	CRSOR P	a CRSOR Pa	CRSOR Pa	CRSOR Co	CRSOR Su	CRSOR Su	CRSOR Su	CRSOR CV	CRSOR CV	CRSOR CC	CRSOR Appro	CRSOR App	proval Expiration Dat	e CRS	SOR Ap	CRSOR A	p
2 N	I/A	1.23E+09	ANGELA	HOFMEIS	1 8/9/1978	CRAWFOR	R Ian Micho	ddiehl5@	6.08E+09			DAMON.C	8/23/2023		8/22/2	2024	50	Hour	
3 N	I/A	3.46E+09	JERRY	ROSE	1/1/1944	CRAWFOR	Jane Doe	ddiehl5@	6.08E+09	Jake McSr	ddiehl5@	DAMON.C	8/23/2023		8/22/2	2024	50	Hour	
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5																			
0																			
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Ready	Sh? Acce	essibility: Un	available										중 Display	Settings	▦ ▣ 巴 -			- + 100	196

Figure 49 CSV Formatted File

7. Use the **Save As...** button to save the file to its proper location.

## **14 Appendix: User Security Roles**

Waiver Agency Admin: This role is assigned to a Waiver Program staff member via the Waiver Program and Program Profile setup process.

Upon successful Waiver Program and Program Profile setup, a PIN letter is generated and sent to the assigned Waiver Agency Administrator. This security role will only become active when the assigned Waiver Agency Admin successfully completes the Portal registration after receipt of the PIN letter.

Only one Waiver Agency Admin security role will be active for each Waiver Agency at any time.

**Clerk Admin**: This role is created by the Waiver Agency Administrator. The roles assigned to the Clerk Admin will be any allowable combination of the roles held by the Waiver Agency Admin.

The Clerk Admin has access to creating and maintaining all Clerk roles within their waiver agency, having access to assigning only their own roles, in any allowable combination, to a Clerk.

The Clerk Admin has access to the use and functionality of any roles assigned.

**CLTS Outlier Request County Submitter**: This role is assigned to a user who works for a county and allows the user to create and submit CRSORs. This role is abbreviated as **CLTS Out Req Cnty** on the Portal.

**CLTS Outlier Request LSS Asst Submitter**: This role is assigned to a user who works for a Waiver Agency sub-contracted organization and allows the user to create and submit CRSORs. This role is abbreviated as **CLTS Out Req LSSAsst** on the Portal.

**CLTS Outlier Request County Approver:** This role is assigned to a user who works for a county and allows the user to both submit and approve CRSORs. This role is abbreviated as CLTS Out Req CtyAppr on the Portal.

**CLTS Outlier Request LSS Approver**: This role is assigned to a user who works for a Waiver Agency sub-contracted organization and allows the user to both submit and approve CRSORs. This role is abbreviated as CLTS Out Req LSSAppr on the Portal.

Note: If a county chooses, a user may act as both a submitter and an approver. The approver roles allow a user to function as both submitter and approver for CRSORs. Only one CRSOR role may be assigned to each clerk user.