Multi-System Youth Application Tracking System (MATS)

Version 1.0

Application Creators, Submitters and Aetna Supervisor User Guide

12/27/2024

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1.0   Overview

The purpose of the Multi-System Youth Application Tracking System (MATS) is to build a comprehensive tracking and documentation system for funding and technical assistance based on information supplied by the child/youths Care Team. This system replaces the existing manual processing of reviewing applications, providing recommendations and outcomes.

One of the goals of the Multi-System Custody Relinquishment Prevention Program is to prevent custody relinquishment for a child/youth with complex multi-system needs solely to access funding for care.

The goals of MATS are to:

- Prevent custody relinquishment for child/youth with complex multi-system needs
- Increase communication transparency and accountability
- Reduce variability and errors in processing applications
- Centralize multiple tracking documentation.

2.0   Terms & Acronyms

Term/Acronym	Definition
Aetna Supervisor	An external non-State user that can read and mark OHR-related MSY applications as incomplete and request additional information or mark it as complete.
Application	MSY funding request
Application Creator/ Initiator/ Requester/Requestor	A user who can create a MATS application. These terms are used interchangeably in the application and user guides.
CME	**Care Management Entity** A contracted entity as defined in Ohio Rule 5160-59-01. In this document it is specifically a contractor with the OhioRISE Plan to manage care for a Child/Youth applying for or enrolled in the OhioRISE program and/or the OhioRISE 1915(c) waiver.

| Term/Acronym	Definition
DCY	**Department of Children Youth.** An umbrella organization that includes FCFC and OFCF.
FCFC/OFCF	**Family and Children First Council / Ohio Family and Children First** A partnership of state and local government, communities and families that enhances the well-being of Ohio's children and families by building community capacity, coordinating systems and services, and engaging families. DCY/OFCF's vision is for every child and family to thrive and succeed within healthy communities.
MATS	**Multi-System Youth Application Tracking System**
MSY	**Multi-System Youth** The State of Ohio's program to prevent custody relinquishment for youth with multi-system needs. The program has the goal of preventing transfer of custody to the child protection system solely for the purpose of obtaining funding to access treatment.
ODM	**Ohio Department of Medicaid** The State of Ohio's department to manage Federal and State health care funding aimed to improve the wellness and health outcomes for eligible individuals and families, including children, pregnant women, seniors, and people with disabilities.
OHR	**OhioRISE**
Submitter	An external state user who can submit applications to MATS ODM.
System	Synonymous with the title system described in this document.
TA	**Technical Assistance**
URL / Link	**Uniform Resource Locator** An address for the web that references a specific location or a page. Can also be referred to as a link.

Table 1: Terms/Acronyms and Their Definitions

3.0   Conventions

The following conventions are used in this document:

- Unsaved sections are indicated by the ✳ icon.
- Errors are indicated by the ⏻ icon.
- The terms "page" and "screen" are used interchangeably.
- Check your junk/spam folders if an email is not found in the inbox.
- The 🗑 icon is used to remove an item.
- The ↗ icon is used to open an application.
- Urgent Applications are indicated by the ⊙ icon.
- The terms Requester/Requestor, Initiator and Application Creator are used interchangeably across this system.

- Typical success message display: ✔ New continued update application started successfully!   ✕
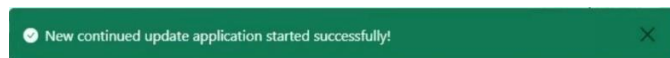
- Typical Confirm Action message display:

  Confirm Action
  ⑦ Are you sure you want to Cancel the application?
  Yes No

4.0   Browser Recommendations

The latest stable version of Microsoft Edge, Google Chrome, or Firefox browser for the best user experience.
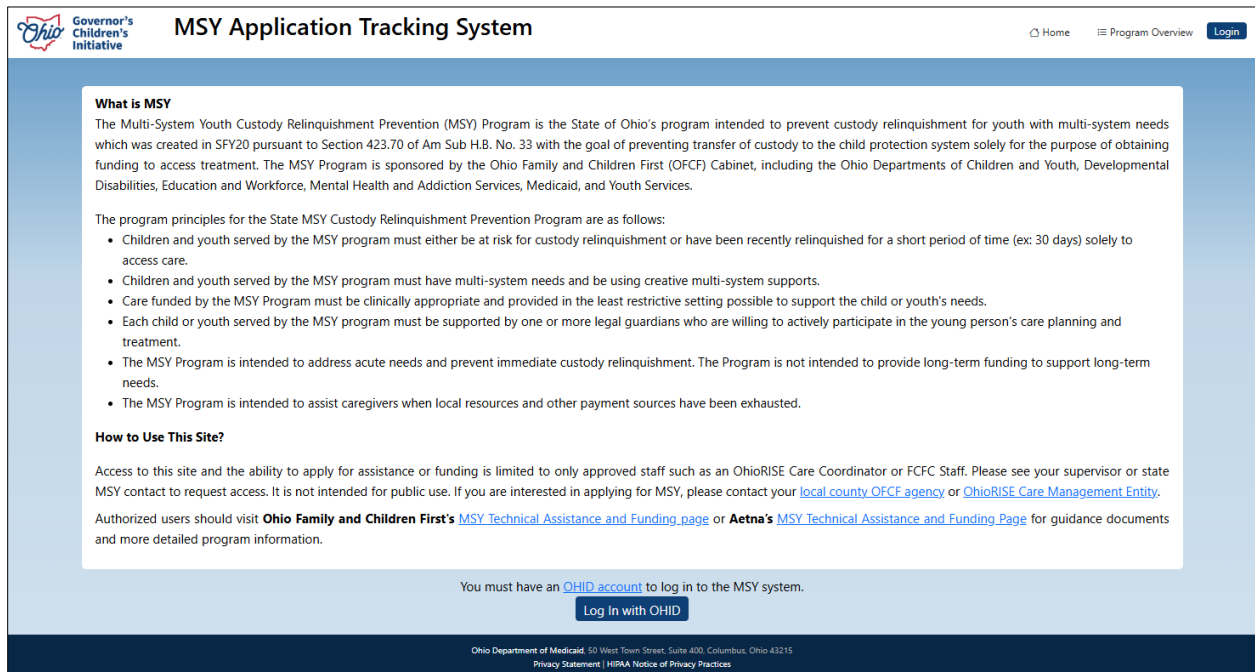
5.0   Request for Access to MATS

Please speak with your supervisor or MSY contact to request access to the system.

6.0   Log In to MATS

The steps to access and log into MATS are:

1. Enter https://mats.medicaid.ohio.gov in your web browser.

2. Click the **Log In with OHID** button to display the "Log In" window.

3. Enter your user ID and password and click the **Log In** button. You will be presented with the "My Queue" page for your organization.

Figure 1. Landing or Home Page
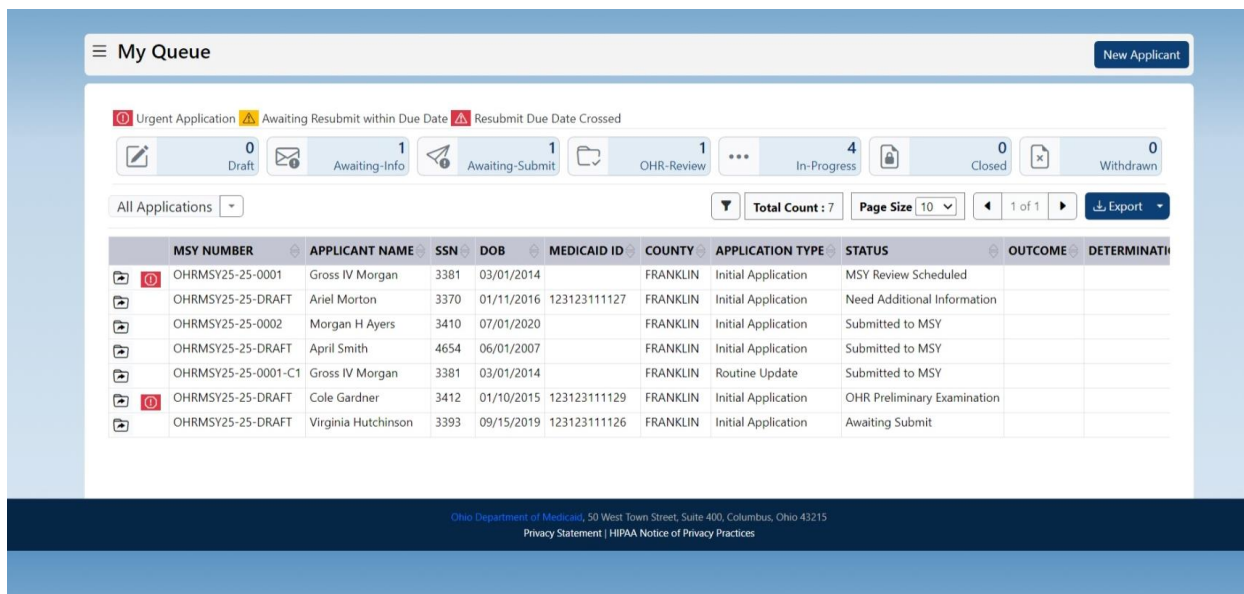
Figure 2. Log In Window

7.0   View/Navigate Applications

Once you are logged in, the following "My Queue" page will display. The page contains all applications in progress for all child/youths **within your organization**. **You cannot access applications outside of your organization.**

Figure 3. My Queue

The My Queue page displays the following tabs, status indicators, and buttons:

1. **Home/Program Overview/My Queue**: Click the tabs to navigate to the respective pages. Home describes MATS and how to use the site; Program Overview outlines the principles and goals of the State's MATS Custody and Relinquishment Prevention Program; My Queue contains a grid of all the applications that you are authorized to view and act on.

2. User's Name**:** At the top right of the page the system displays your name and the dropdown displays your role. The dropdown options also allow you to:

   - View your profile (in the profile popup),
   - Sign out of the system

3. **New Applicant:** Click this button to create a new initial applicant.

4. **Urgent Application:** Applications that require urgent attention are marked by the ⓘ icon. Applications should only be submitted as urgent when the child/youth is at risk for custody relinquishment or other significant challenges within the next ~~3~~ business days.

5. High-level Status Indicators: Displays the number of applications and their status, as follows:

- **Draft –** Displays the number of applications that are in Draft status.

- **Awaiting Info** – Displays the number of applications that are waiting for additional information from the Creator in response to Submitter or ODM request.

- **Awaiting Submit** - Displays the number of applications that are waiting to be submitted.

- **OHR Review** - Displays the number of applications that have been submitted by an Aetna OhioRISE organization and are under review by ODM.

- **In Progress** – Displays the number of submitted applications that are under review by State Team reviewers or ODM.

- **Closed** – Displays the number of applications whose outcomes have been determined and/or closed by ODM.

- **Withdrawn** - Displays the number of applications that have been withdrawn by ODM.

6. **All Applications**: This is a dropdown to quickly filter applications based on their status (**Awaiting Submit/Awaiting Additional Info/Urgent Application/All Applications**). By default, all applications in progress are displayed.

7. **Total Count:** This displays the total number of applications in progress for the user's organization

8. **Page Size:** This displays the number of applications on the page. Click the buttons to change the value to display more or fewer applications on the page.

9. **X of Y:** This means, e.g., page 1 of 4. Click the left- or right-arrow icon to navigate between pages.

10. ⬇ Export ▾**:** Click the **Export** button and select an option from the dropdown to download the data to an Excel spreadsheet. You have three options:

- Current Page: all applications visible on your screen
- Filtered Items: applications that meet the multi-filtered criteria
- All Items: all records that you are authorized to view

11. ▼: Click this button to filter applications based on a field or column value. This action will display a Search textbox and several dropdown options (see 12 and 13 below).

Figure 4. Creating a New Applicant

12. **Search:** This textbox is used to search for applications containing a specific value in any field or column. Type a value, e.g., Medicaid ID number, and the system will return applications containing that value.

13. Other dropdowns (**County, Application Type, Outcome, Determination, and "Is Urgent"**): These are multi-select dropdowns allowing you to drill down to a subset of applications meeting these criteria simultaneously.

14. ⤴ : Click this icon to the left of any MSY number to view the application detail page.

8.0   Create Applications

Application Creators can only create and save applications. Submitters can both create and submit applications.

> If you are an FCFC Application Creator, you can access applications for only one authorized county. However, if you are a CME or Aetna Application Creators, you can access applications for multiple authorized counties.

As an Application Creator you can create an initial application for any Requested Assistance type (Technical Assistance, Funding, or Both).

> Before creating a new initial application you must search for any existing applications for the child/youth. If any active applications are found in the system, you cannot create a new initial application. **However, if there is a closed application you will be able to create an initial application.**

8.1   Search for Existing Applications

Complete the following steps to check for the applicant's existing records:

1. On the "My Queue" page, click the **New Applicant** button. The "New Application – check existing records" popup is displayed.

Figure 5. Checking Existing Records
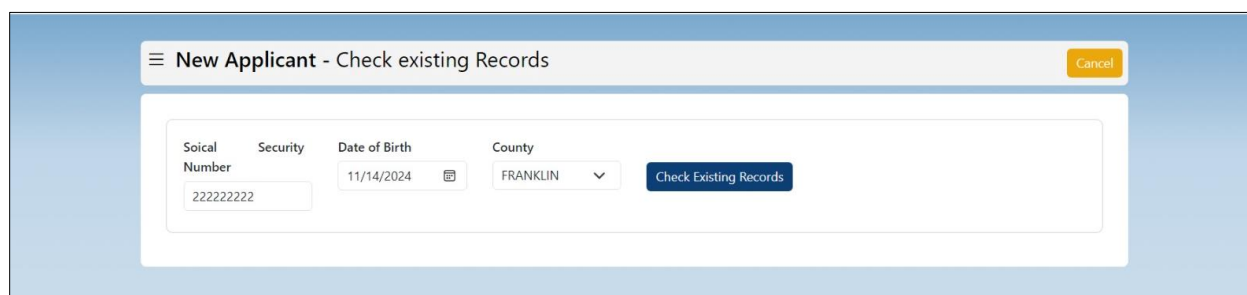
2. Enter the applicant's full 9-digit Social Security Number (SSN).
3. Enter the applicant's Date of Birth (DOB) in the mm/dd/yyyy format using the calendar icon.
4. Choose a County from the dropdown.
5. Click the **Check Existing Records** button. If no existing applications have been found, the following "Child/Youth Demographics" page is displayed for you to start a new initial application.
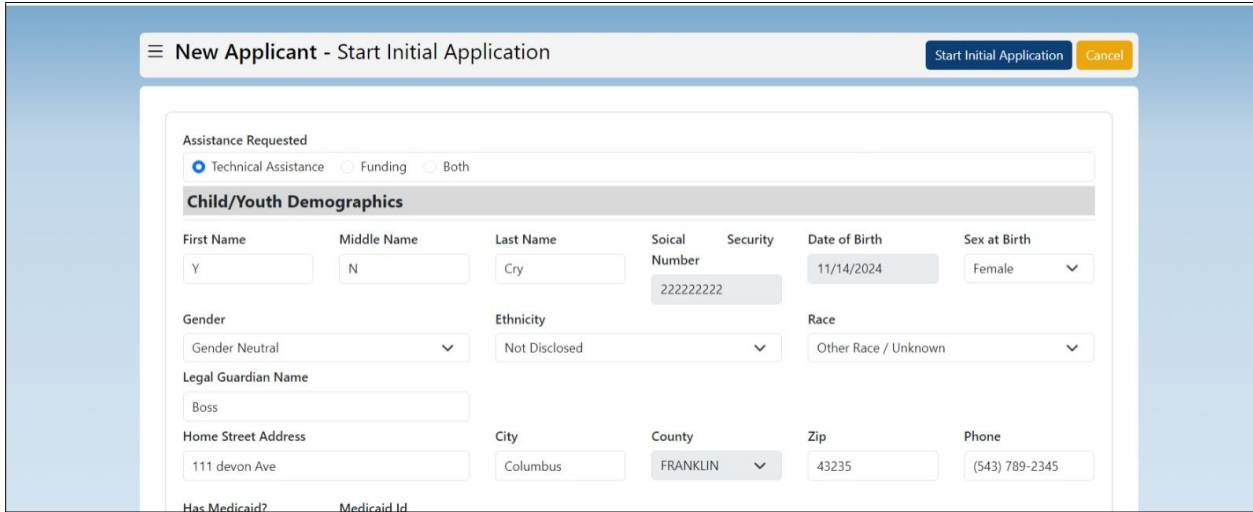
Figure 6. Child/Youth Demographics

8.2 Start an Initial Application

On the "Start Initial Application" page above, complete the following steps to start an initial application:

1. Select an assistance requested type in the "Assistance Requested" column.
2. Fill in the required demographic information for the new applicant.
3. Click the **Start Initial Application** button. The initial application will open with the auto-filled demographics for the applicant and be populated with sections and menus relevant to the assistance requested in the left panel. Note that this initial application displays its status as "Draft Application Started." The MSY number (MSY25-25-DRAFT) also indicates its draft status.

Figure 7. Starting an Initial Application

4. Fill in the required information for all sub-sections shown in the left panel of the screen, beginning with "Section 1: Child/Youth Information." You can toggle the ⋀ icon to collapse or expand the menus.

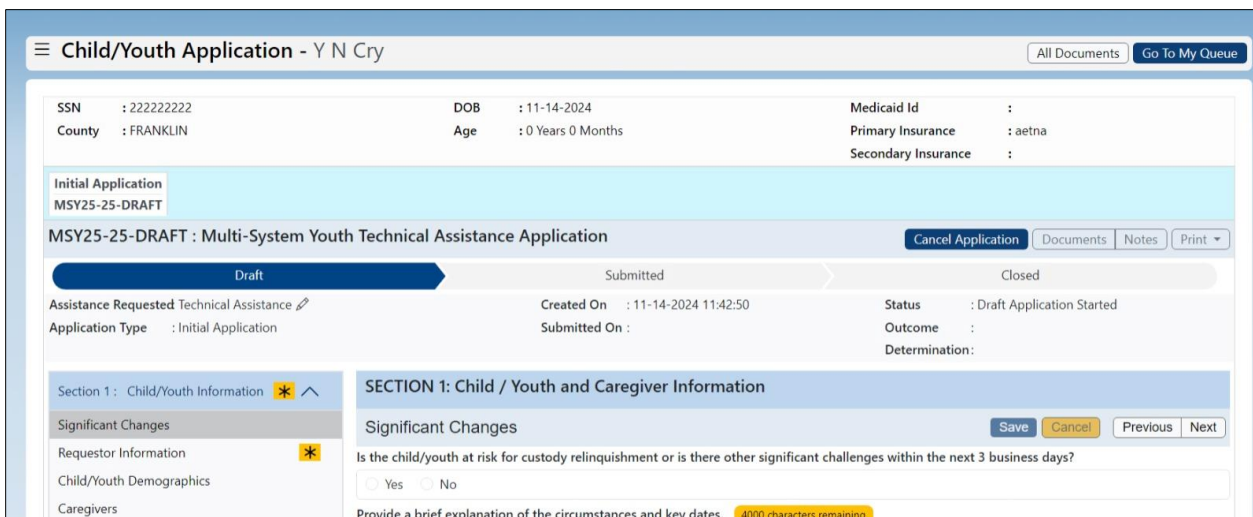5. Click **Save** as you fill out each sub-section. Save allows you to save a partial or incomplete section in the application. You can navigate from one section to another by clicking the **Previous** or **Next** button. You can click the **Cancel** button to reset the data.

6. When all the sections pertinent to the application have been completely filled out, click the **Send To…** or **Submit To…** button.

7. Confirm your action on the "Confirm Action" popup by clicking the **Yes** button. The status of the application will change from draft to "Awaiting Submit" and the application will move to the Submitter's queue. From this point on, the application creator cannot edit the application.

If the organization type selected is "Ohio Rise Care Management Entity," in Section 1: Requestor Information," then the application is routed to Aetna Supervisor for review. The status of the application changes to "OHR Preliminary Examiner" and the application is now in the Aetna Supervisor's queue. After reviewing and making any necessary changes, the Aetna Supervisor submits the application to MSY team at ODM.

8.3   Edit Initial Application for an Existing Applicant

If you want to change the assistance requested for an existing applicant, complete the following steps:

1. Open an existing application.
2. Click the edit ✎ icon on the application detail page. The action will display the "Edit Application" popup window.
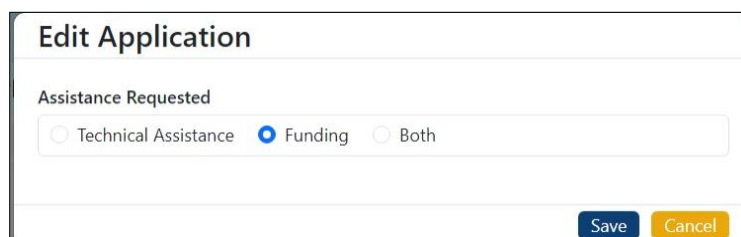

Figure 8. Edit an Initial Application

3. Select an option and click the **Save** button. The refreshed page will display the changed requested assistance.
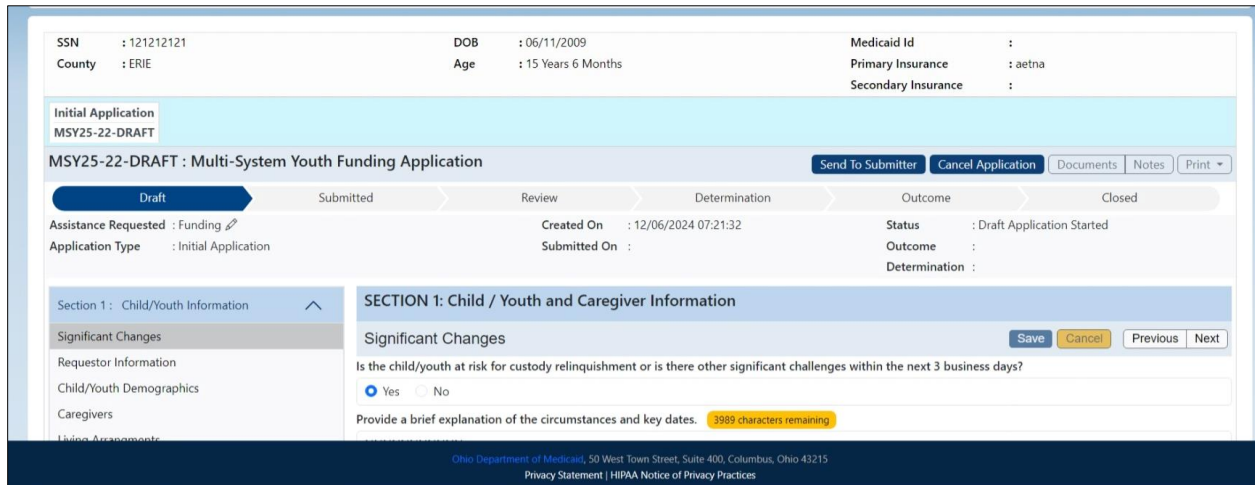
Figure 9. Edited Application

4. Then follow Steps 4 through 7 enumerated for the illustrated initial application in Section 8.2.

9.0 Create Continued Updates and Applications for Additional/Shifting Funds

Continued or additional/shifting of funds applications can be created only for funding. You cannot create a continued or additional/shifting of funds application before the previous funding application has been submitted.

To create a continued update or additional/shifting of funds application, complete the following steps:

1. Open an active application.

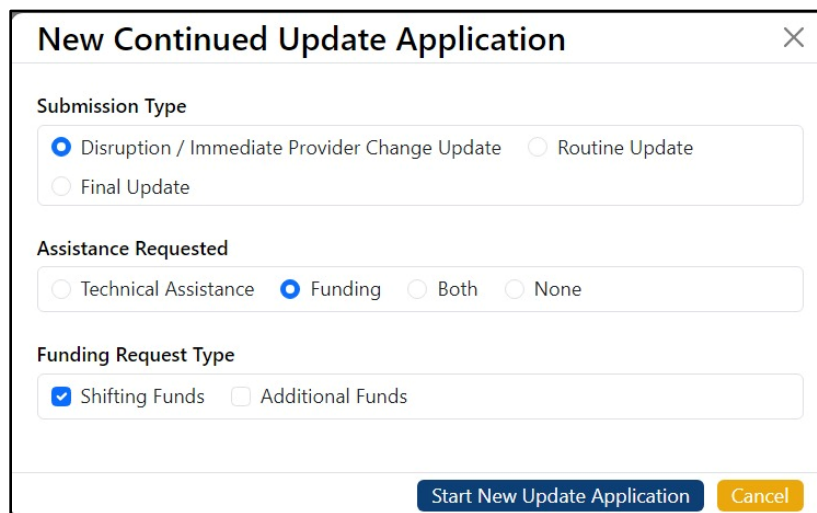2. Click on **Continued Update Application** button.

Figure 10. Continued Update and Additional/Shifting of Funds Application

3. Fill in the required data in the popup (which has Submission Type, Assistance Requested, and Funding Request Type – that define the application)

Submission Type can be either Disruption, Routine or Final Update. If the submission type is Disruption or Routine, all four options under Assistance Requested will be available. If it is a Final Update, then you can select only None under Assistance Requested.

If "None" or "Technical Assistance" is selected under Assistance Requested, then the Funding Request Type (Shifting Funds and Additional Funds) will be disabled.
If you select Funding as Assistance Requested, then both options under Funding Request Type will be available.

4. Click the **Start New Update Application** button.

5. Fill in the required data for each section/sub-section and click the **Send To…** button. The Submitter then reviews the update application, makes edits if necessary, and submits it to MSY ODM.
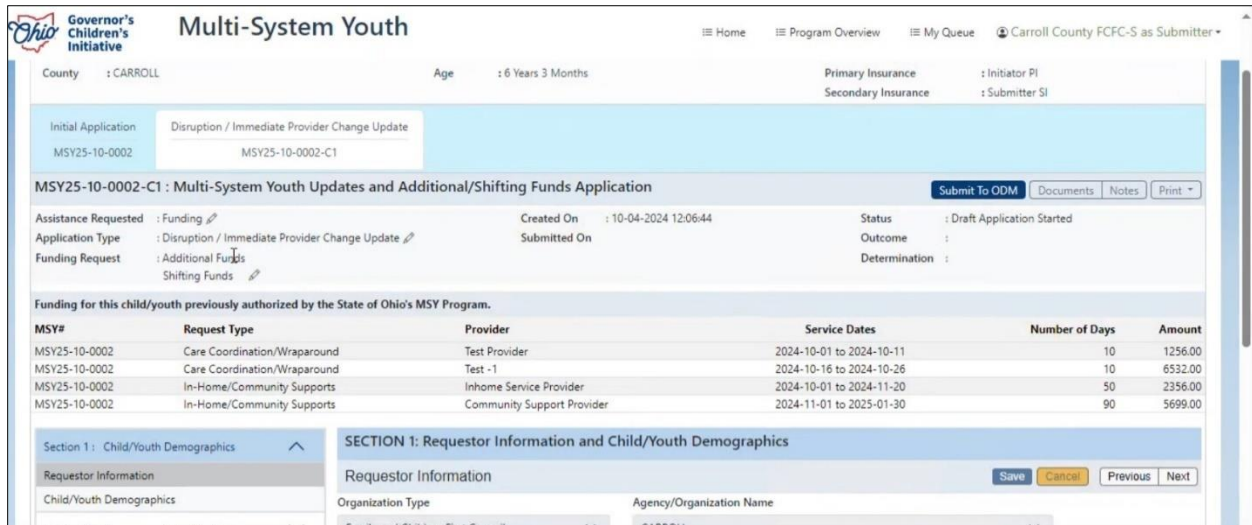

Figure 11. Submitting a Continued Update Application

You can create and submit an update application for each Submission Type.

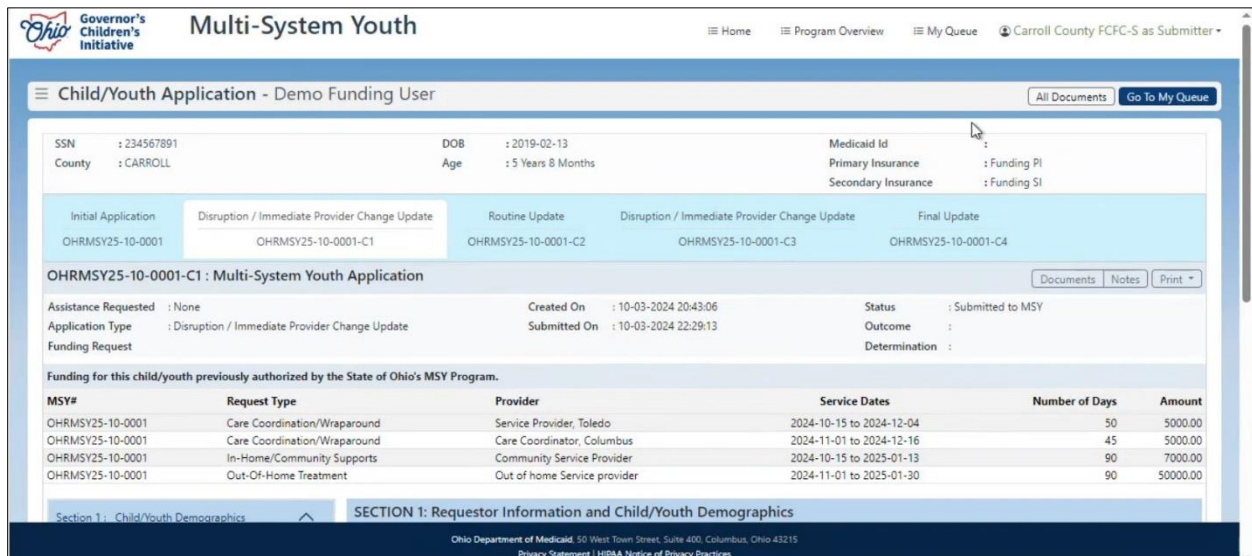The figure below displays several new update applications created for an applicant.

Figure 12. Update Applications Created for an applicant

10.0   Print Attestation/Release of Information

Signed Attestation form is required for submitting both initial and continued applications; the Release of Information form is required **only** for initial applications. The following steps must be completed by the application creator/submitter:

1. Click the **Print** button and select the appropriate form from the dropdown. The form will open in a window on the right.
2. Click the **Print** button in the window on the right.
3. Complete and obtain signatures from the required parties on the printed form.
4. Take a photo of, scan, or digitize the signed and completed forms in the manner of your choosing.
5. Upload the documents (see Section 13.2 of this guide, "Add/Replace/Remove Documents," for steps to upload documents).

11.0   Submit Applications

11.1 Requirements for Submitting Applications

Before applications can be submitted to MSY ODM, they must be error free and fully validated. The system indicates errors, missing fields, and field format errors by marking the affected section(s) as well as the specific sub-sections with the 🔴 icon. The fields in error are shown bordered in red.

11.2 Submit Applications

Once the Application Creator has sent the initial or continued application to the Submitter or Aetna Supervisor, the latter can review, edit and submit the application to MSY ODM. MSY applications submitted by the FCFC will come directly to ODM through MATS but OhioRISE applications will go directly to Aetna Supervisor for review. The Application Creator/Submitter will be notified of its submission and the application detail page will indicate this change in status as shown below:
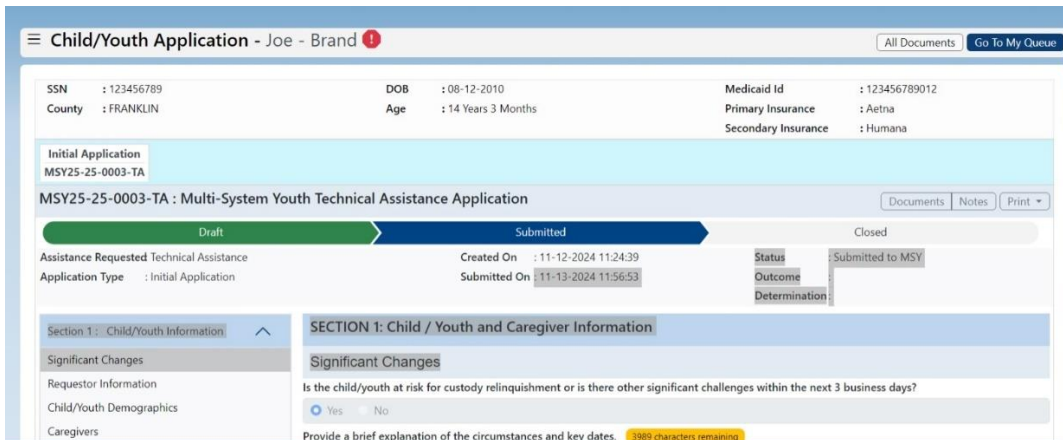
Figure 13. Submitted Initial Application

12.0 Cancel Applications

You can cancel an initial application as long as it is in Draft status, that is, it has not been submitted to MSY ODM. The steps required to cancel applications in draft status are:

1. Click the **Cancel Application** button. You will be prompted with a "Confirm Action" popup.
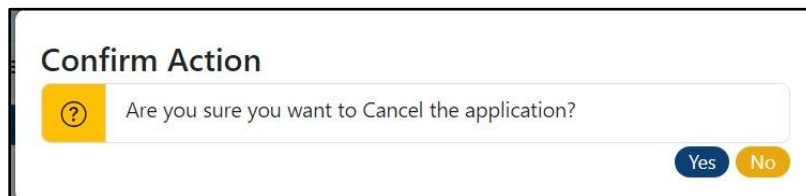

Figure 14. Confirm Action Popup

2. Click the **Yes** button. The page will refresh to display its timed cancelled status. However, cancelled applications will not be displayed in any queues.

> If the application is not in draft status and you would like to withdraw the application, send an email to your MSY contact at ODM.

13.0 Add Notes/Documents to Applications/ Remove Documents

Application creators and submitters can add or upload notes and documents to draft or saved applications only, and not to submitted applications. Different categories of notes and documents can be added.

13.1 Add Notes

The steps to add notes are:

1. Click the **Notes** button. A "Notes" window will open on the right side of the page.
2. Type your note in the textbox. You can enter one or more notes that will appear with your name and the time stamp as shown below.
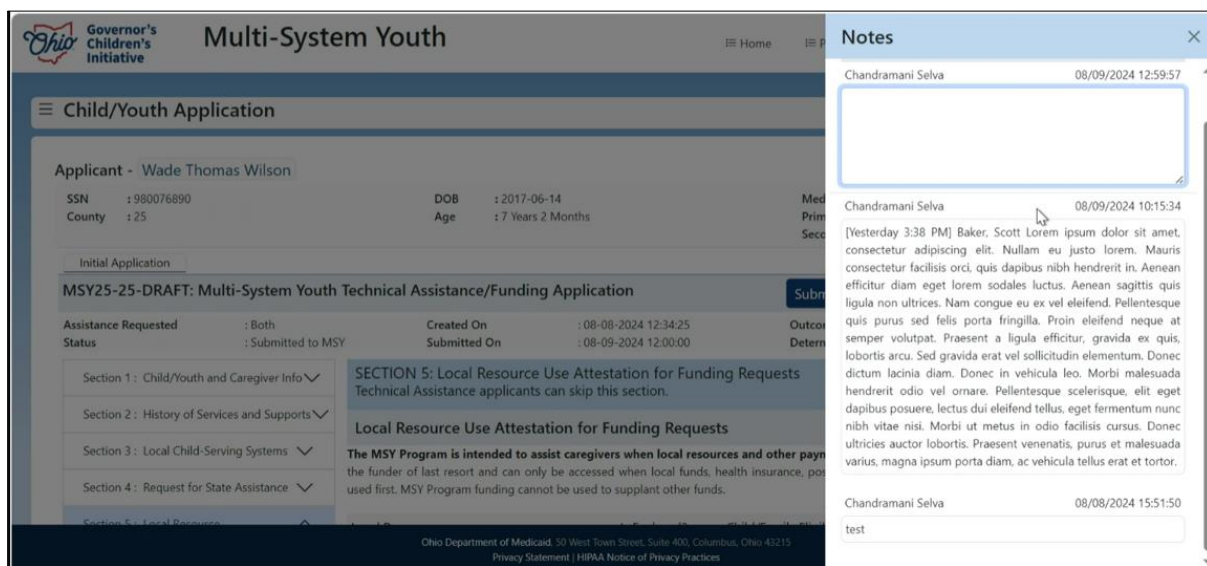
Figure 15. Add a Note

13.2 Add/Replace/Remove Documents

> Only documents added by your organization can be removed.

The steps to upload and replace documents are:

1. Click the **Documents** button.
2. Click the ⬆ icon under any document category to upload a document. If a document has already been uploaded, it will be replaced by the new document.

3. To remove an existing document, click the 🗑 icon.
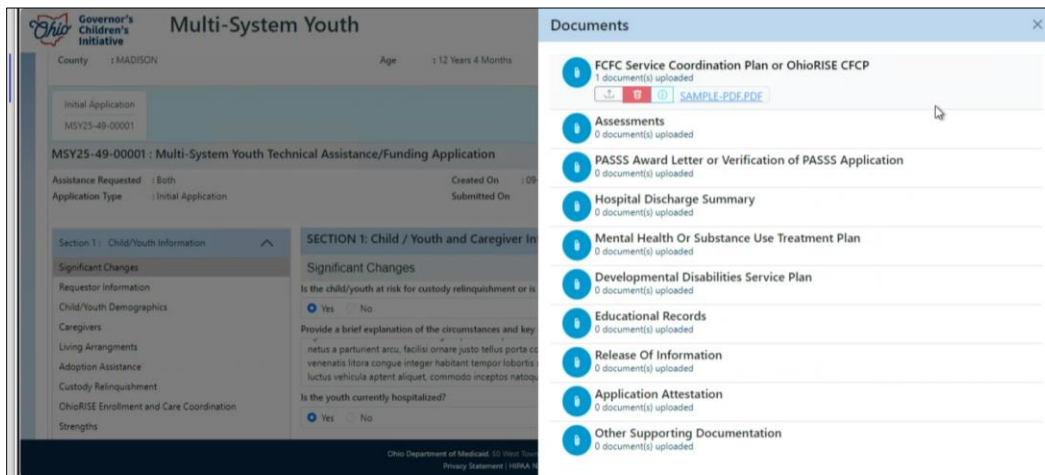4. Click the ⊙ icon to display information about the current document.

Figure 16. Add/Replace/Remove Document

14.0 Request for Additional Information

The steps to request additional information from the Application Creator are:

1. Click the **Request Additional Info** button. The "Additional Information Request Notes" popup is displayed.
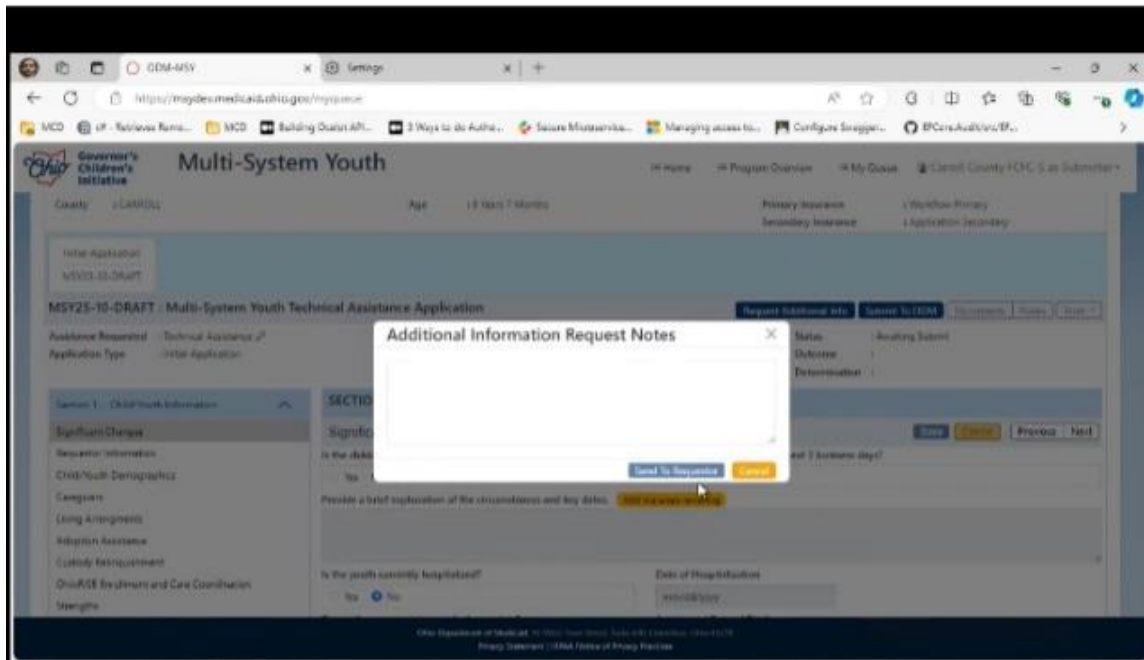
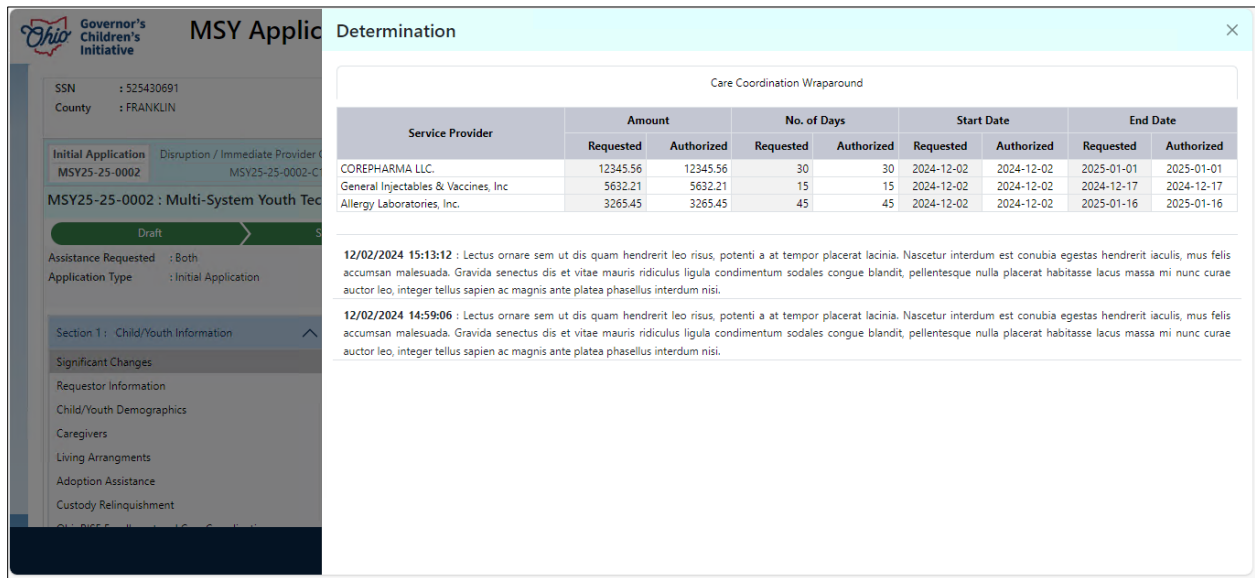*Figure 17. Additional Information Request Notes (from Submitter to Creator)*

2. Enter a note describing what information is being requested and click the **Send To Requestor** button. The status of the application changes to "Need Additional Information."
3. The Application Creator provides the required additional information and the status of the application changes to "Awaiting Submit."
4. The Submitter reviews the information, makes changes to the application, if necessary, and re-submits the application by clicking the **Send to ODM** button with confirmation.

15.0 View Determination Outcomes for Applications

Once a funding determination has been made on an MSY application, an email notification will be received. **Funding determinations are final and not subject to appeal.**

You can view the determination outcomes for the application using the following steps:

1. On the My Queue page, open an application with the status of "MSY Final Determination Completed."
2. Click the **Determination** button on the application detail page to view the ODM's decisions.

Figure 18. Determination Outcomes for an Application

16.0   Changing Phone Number and Email Address

The requestor email and phone number can be changed at any time, even after the application has been submitted. This is to ensure that the correct person will get the notification emails if the existing requestor on an application is no longer available. The steps to changing a phone number and email address are:

1. Edit the phone number and email address in the "Requestor Information" section of the application as shown below.
2. Click the **Save** button.

Figure 19. Editing Phone number and Email Address