

# Waiver Support Application

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## HABILITATION SUPPORT WAIVER (HSW) CMH/PIHP TRAINING MANUAL



State of Michigan  
Department of Community Health

*Last Update: August 2013*

## ***Table of Contents***

<b>1</b>	<b>Introduction .....</b>	<b>3</b>
<b>2</b>	<b>Accessing the HAB Application .....</b>	<b>4</b>
<b>3</b>	<b>Viewing HAB Slot Allocation.....</b>	<b>7</b>
<b>4</b>	<b>Creating a Case .....</b>	<b>8</b>
<b>5</b>	<b>Verifying/Approving Initial Enrollment.....</b>	<b>11</b>
<b>6</b>	<b>Maintaining Case Details.....</b>	<b>19</b>
<b>7</b>	<b>Disenrolling a HAB Beneficiary .....</b>	<b>28</b>
<b>8</b>	<b>Generating Reports.....</b>	<b>31</b>
<b>9</b>	<b>Updating User Assignment.....</b>	<b>33</b>

# 1 Introduction

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## About the HAB Manual

The Waiver Support Application (WSA) is the management tool for HAB (Habilitation Support), SED (Serious Emotional Disturbance), CWP (Children’s Waiver Program), and AUT (Autism) enrollment and monitoring.

This document provides HAB instruction for the **Community Mental Health (CMH) and Prepaid Inpatient Health Plan (PIHP) roles**. Included are quick reference guides with example screen shots to help explain system procedures.

## 2 Accessing the HAB Application

**Purpose:** The purpose of this quick reference guide (QRG) is to assist workers with subscribing to the Habilitation Support (HAB) application. Once subscribed, HAB access is obtained through the State of Michigan Single Sign-On tool.

### Steps:

Figure 1: Single Sign-On Login

1. Access the State of Michigan Single Sign-On tool: <https://sso.state.mi.us>
2. Login or register as appropriate. The Single Sign-On Application Portal screen appears.

Figure 2: Single Sign-On Application Portal

**Note:** If already subscribed to the Waiver Support Application (WSA) (e.g., you already use the Autism [AUT] application or the Serious Emotional Disturbance [SED] application), “WSA Waivers” appears on the Single Sign-On Application Portal screen. In this situation, **do not** complete the following steps; instead, email the HAB database administrator (DBA) to request your HAB worker security role assignment.

3. Click Subscribe to Applications. The Single Sign-On Subscription screen appears.

Figure 3: Single Sign-On Subscription

4. Verify **Dept of Community health** is selected in the first list.
5. Select **WSA Waivers** in the second list.
6. Click **Next**. The Single Sign-On Required Values screen appears.

Figure 4: Single Sign-On Required Values

7. Enter required values as appropriate.
8. Click **Continue**. The Single Sign-On Enrollment Confirmation screen appears.

Figure 5: Single Sign-On Enrollment Confirmation

9. Verify your User Info.
10. Click **Confirm** if everything is correct. The Single Sign-On Success screen appears.

**Note:** Click **Back** to make any corrections.

Figure 6: Single Sign-On Success


11. Click **Close**.

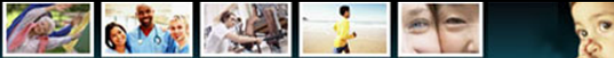
**Note:** Once the request for access has been submitted and processed, the DBA will assign the worker's security role(s) within the HAB application.

### 3 Viewing HAB Slot Allocation

**Purpose:** The purpose of this quick reference guide (QRG) is to assist workers with viewing Habilitation Support Waiver slot allocation in the Habilitation Support (HAB) application. Each Prepaid Inpatient Health Plan (PIHP) has a defined number of monthly slots per fiscal year.

**Steps:**





Michigan.gov  
The Official State of Michigan Website

Home

Training

▶ HAB

▶ Person

Reports

Print

Contact

Exit

Slots Usage Report by PIHP for Fiscal Year: 2013

Total Cumulative Slots

Used

Remaining

8268

20

8248

<< Previous Year

Next Year >>

Update Yearly Slots

Add New Yearly

PIHP Name	Fiscal Year	Utilization	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
Access	2013	Owned	388	388	388	388	388	388	388	388	388	388	388	388
Access	2013	Loaned	0	0	0	0	0	0	0	0	0	0	0	0
Access	2013	Borrowed	3	1	1	1	1	1	1	1	0	0	0	0
Access	2013	Used	5	5	5	5	5	6	7	7	8	10	13	13
Access	2013	Available	386	384	384	384	384	383	382	382	380	378	375	375
Access	2013	% Used	1.3	1.3	1.3	1.3	1.3	1.5	1.8	1.8	2.1	2.6	3.4	3.4
CEI	2013	Owned	375	375	375	375	375	375	376	376	376	376	376	376
CEI	2013	Loaned	3	0	0	0	0	0	0	0	0	0	0	0
CEI	2013	Borrowed	0	0	0	0	0	0	0	0	0	0	0	0
CEI	2013	Used	0	0	0	0	0	1	1	1	1	1	1	1
CEI	2013	Available	372	375	375	375	375	374	375	375	375	375	375	375
CEI	2013	% Used	0	0	0	0	0	0.3	0.3	0.3	0.3	0.3	0.3	0.3
Central	2013	Owned	555	555	555	555	555	555	555	555	555	555	555	555
Central	2013	Loaned	0	0	0	0	0	0	0	0	0	0	0	0
Central	2013	Borrowed	0	0	0	0	0	0	0	0	0	0	0	0
Central	2013	Used	0	0	0	0	0	0	0	0	0	0	0	0
Central	2013	Available	555	555	555	555	555	555	555	555	555	555	555	555
Central	2013	% Used	0	0	0	0	0	0	0	0	0	0	0	0
Detroit	2013	Owned	1226	1226	1226	1226	1226	1226	1225	1225	1225	1225	1225	1225

Figure 1: Slot Maintenance

1. Select **HAB > Slots Maintenance** in the top menu. The Slot Maintenance screen appears, displaying slot allocation for the current fiscal year.
2. To view historical slot utilization, click <<Previous Year until the desired fiscal year is located.
3. To view future slot allocation, click Next Year>> until the desired fiscal year is located.

## 4 Creating a Case

**Purpose:** The purpose of this quick reference guide (QRG) is to assist workers with creating a case in the Habilitation Support (HAB) application. Once created, the case's initial enrollment details must be verified and approved prior to moving the case forward. Please reference [Verifying/Approving Initial Enrollment](#) for further information.

The Prepaid Inpatient Health Plan (PIHP) worker creates the case, verifies the initial enrollment information, and submits the case to the Michigan Department of Community Health (MDCH) worker for review and approval. Upon MDCH approval the case becomes part of the HAB production system, signaling commencement of Habilitation Support Waiver enrollment and payments.

**Note:** Community Mental Health (CMH) workers can access a case after initial enrollment approval. Please reference [Maintaining Case Details](#) for further information.

### Steps:

Figure 1: Person List

1. Select **Person > Persons** in the top menu. The Person List screen appears.
2. Enter the beneficiary's Medicaid identification number (ID) in the **Beneficiary ID** field.
3. Click **Filter**. Verify an ongoing HAB case does not already exist for the beneficiary.
4. Click [Add-HAB-Case](#). The Add HAB Case screen appears.
5. Enter the beneficiary's Medicaid ID in the **Beneficiary ID** field.
6. Click [Search](#).

**Note:** The HAB application first searches the Waiver Support Application (WSA) and then the MDCH Data Warehouse for a beneficiary match.



The screenshot shows the 'Add HAB Case' page on the Michigan Department of Community Health website. At the top is a navigation bar with links: Home, Training, HAB, Person, Reports, Print, Contact, and Exit. Below the navigation bar is a search section with a 'Beneficiary ID' input field and a 'Search' button. Underneath is a 'Data Warehouse Results' table with columns for 'Beneficiary ID', 'Beneficiary Name', and 'DOB'. A 'View Add-Case' link is visible next to the table. At the bottom, there is a 'Message:' section with 'Action:' links for 'Cancel' and 'Help'. The footer contains various policy links and a copyright notice for 2001-2011 State of Michigan.

Figure 2: Add HAB Case

- Click View beside the beneficiary's record. The Beneficiary Information window appears; verify the beneficiary's demographic details. Click Close.

**Note:** If you have accessed the incorrect beneficiary's record, click Cancel on the Add HAB Case screen and begin again.

The screenshot shows the 'Beneficiary Information' window. It contains a table with the following fields: Beneficiary ID, Name, Date of Birth, Address, and City. To the right of the table are input fields for 'State' (with 'MI' selected) and 'Zip' (with '48063' entered). A 'Close' button is located at the bottom right of the window.

Figure 3: Beneficiary Information

- Click Add-Case. The case creation confirmation message displays.

The screenshot shows a 'Message from webpage' dialog box. It contains a question mark icon and the text: 'This will add a new case for this person. Are you sure this is what you wish to do?'. At the bottom of the dialog box are two buttons: 'OK' and 'Cancel'.

Figure 4: Case creation confirmation message

- Click **OK**. The Initial Enrollment screen appears.

Figure 5: Initial Enrollment

10. Enter the **Enrollment Date**.

**Note:** It is acceptable to enter an anticipated enrollment date; the value can be updated later to reflect the actual enrollment date, if different.

11. Select the appropriate Prepaid Inpatient Health Plan (PIHP) and Community Mental Health (CMH) combination in the **PIHP/CMH** list.

12. Select the appropriate county in the **HSW Capitation County** list.

**Note:** The available **HSW Capitation County** options are dependent upon the **PIHP/CMH** selected.

13. Enter the **Consumer Id**, if available.

14. Enter detailed **Comments** regarding the initial enrollment, if applicable.

**Note:** Comments entered here display on the case's Maintain Enrollment screen.

15. Click Add-Case. The Maintain Enrollment screen appears, displaying 'P' on each tab containing pending case information. Continue with [Step 5 of Verifying/Approving Initial Enrollment](#) below.

## 5 Verifying/Approving Initial Enrollment

**Purpose:** The purpose of this quick reference guide (QRG) is to assist workers with verifying and approving pending initial enrollment details in the Habilitation Support (HAB) application. Only upon final Michigan Department of Community Health (MDCH) approval will the initial enrollment become an 'Open' case in the HAB production system, signaling commencement of Habilitation Support Waiver enrollment and payments.

The HAB application consists of the pending environment and the production system. Initial enrollment information is entered into the pending environment; after the appropriate approval is recorded, the pending information becomes live data in the production system.

Upon accessing the pending environment, the **Pending** button turns gray. Upon accessing the production system, the **Production** button turns gray. Additionally, the name of the tab currently in use (e.g., Enrollment, Comments) turns gray. Please reference [Figure 2](#) below.

### Steps:

Michigan.gov  
The Official State of Michigan Website

Home Training HAB Person Reports Print Contact Exit

Either enter a beneficiary ID -or- a Case ID -or- enter the search criteria below:

Beneficiary ID:

Case ID:

Beneficiary name:  ☒ Starts With ☐ contains

☒ PIHP/CMH ☐ CMH Review ☐ PIHP Review ☐ DCH Review ☐ Complete ☐ Rejected

Current Work Queue:

Enrolled Status: ☒ All Enrolled ☐ Active ☐ Inactive

Include Disenrolled: ☐

(Select 0 or more search criteria from above and then press the 'search' button)

Search Reset

Results :

Case ID	Beneficiary ID	Beneficiary Name	Beneficiary DOB	Work Queue	Status	Functions
				DCH	Pending	<a href="#">Prod View</a>   <a href="#">Pending View</a>
				PIHP	Pending	<a href="#">Prod View</a>   <a href="#">Pending View</a>
				DCH	Open	<a href="#">Prod View</a>   <a href="#">Pending View</a>
				DCH	Open	<a href="#">Prod View</a>   <a href="#">Pending View</a>

1 | 2

Michigan.gov Home | MDCH Home | Contact MDCH | State Web Sites  
Privacy Policy | Link Policy | Accessibility Policy | Security Policy | Michigan News | Michigan.gov Survey  
Copyright © 2001-2011 State of Michigan

Figure 1: HAB Beneficiary Search

1. Select **HAB > Beneficiary Search** in the top menu. The HAB Beneficiary Search screen appears.
2. Either enter the beneficiary's Medicaid ID in the **Beneficiary ID** field, or enter a combination of other search criteria.
3. Click **Search**.

**Note:** Simply clicking **Search** using the default criteria selections returns all current HAB cases. Please note the **Beneficiary ID** value takes precedence; if populated, the search is performed solely on the Medicaid ID regardless of any additional criteria selected.

**Note:** To include disenrolled cases in the results, the **Include Disenrolled** check box must be selected.

4. Click Pending View beside the beneficiary's record. The Maintain Enrollment screen appears.

**Note:** A 'P' displays on each tab containing pending case information, indicating the initial enrollment details must be approved prior to moving forward.

Figure 2: Maintain Enrollment – pending environment/Enrollment tab

**Note:** Clicking More-Info in the header provides additional beneficiary details.

Figure 3: More Info

**Note:** Throughout the HAB application, click Return to Splash to access the Waiver Support Application (WSA) home screen.



Figure 4: WSA home screen (Splash page)

5. Verify the initial enrollment details. To make modifications or enter additional enrollment comments:

**Note:** Use the **Comments** functionality as a communication tool as the case moves through the initial enrollment approval process. Please note that comments entered on any tab **other than** the **Comments** tab are not permanent; they can be modified or deleted.

- a. Click Modify Enrollment. The enrollment detail fields become enabled.
- b. Enter or update the appropriate information, and click Save.

**Note:** The initial enrollment record *cannot* be deleted, and the initial enrollment **Beneficiary ID** (Medicaid ID) *cannot* be modified.

Figure 5: Maintain Enrollment – modify mode

6. Click the **Certification** tab. The Maintain Certification screen appears.
7. Verify the certification details. To make modifications or enter certification-related comments:
  - a. Click Modify Certification. The certification detail fields become enabled.
  - b. Enter or update the appropriate information, and click Save.



The screenshot shows the MDCH Department of Community Health web application. The header includes the MDCH logo, navigation links (Home, Training, HAB, Person, Reports, Print, Contact, Exit), and the Michigan.gov logo. The main content area displays the 'Beneficiary ID' and 'Beneficiary Name' fields, with 'Status' set to 'Pending'. Below this are tabs for 'Enrollment', 'Certification', 'Consent', 'Status', 'Comments', 'Service', 'Document', and 'Disenrollment'. The 'Certification' tab is active, showing a table with columns: 'Begin Date', 'End Date', 'Status', 'Reason', 'Comments', 'Message', and 'Functions'. The table has two rows: one with '02/01/2013', '01/31/2014', 'Certified', 'Initial Certification', and another with empty fields and 'Consent Received'. The footer contains links for 'Privacy Policy', 'Link Policy', 'Accessibility Policy', 'Security Policy', 'Michigan News', and 'Michigan.gov Survey'.

Figure 6: Maintain Certification – modify mode

8. Click the **Consent** tab. The Maintain Consent screen appears.
9. Verify the consent details. To make modifications or enter consent-related comments:
  - a. Click Modify Consent. The consent detail fields become enabled.
  - b. Enter or update the appropriate information, and click Save.

The screenshot shows the MDCH Department of Community Health web application in 'Maintain Consent – modify mode'. The header and navigation links are the same as in Figure 6. The 'Consent' tab is active, showing a table with columns: 'Begin Date', 'End Date', 'Status', 'Comments', 'Message', and 'Functions'. The table has two rows: one with '02/01/2013', '01/31/2016', 'Consent Received', and another with empty fields and 'Consent Received'. The footer contains links for 'Privacy Policy', 'Link Policy', 'Accessibility Policy', 'Security Policy', 'Michigan News', and 'Michigan.gov Survey'.

Figure 7: Maintain Consent – modify mode

10. Click the **Status** tab. The Maintain Status screen appears.
- Note:** The HAB application has a header **Status** in addition to the **Status** tab details. The header **Status** indicates the systematic workflow status: 'Pending' (i.e., initial enrollment, prior to MDCH approval), 'Open' (i.e., approved), or 'Closed' (i.e.,

disenrolled, withdrawn, or rejected). The **Status** tab indicates the HAB case's status: 'Active' or 'Inactive'.

11. Verify the status details. To make modifications or enter status-related comments:
  - a. Click Modify Status. The status detail fields become enabled.
  - b. Enter or update the appropriate information, and click Save.

Figure 8: Maintain Status – modify mode

12. To add a comment regarding the initial enrollment, click the **Comments** tab. The Maintain Comments screen appears.

**Note:** Comments entered on the **Comments** tab are a permanent part of the case record; they **cannot** be modified or deleted. These comments must be grammatically correct, reflect only the facts, and written using professional language.

**Tip:** Use the **Comments** tab functionality to capture information that needs to remain permanently with the case (e.g., a transfer between two Prepaid Inpatient Health Plans [PIHPs]).

- a. Click Add-New-Comment. The **Comments** field appears.
- b. Enter a detailed comment.
- c. Click Add-New-Comment to save the information; the new comment appears in the Comment List.

Figure 9: Maintain Comments – add mode

13. Click the **Service** tab. The Maintain Services screen appears.
14. Verify the service details. To make modifications or enter service-related comments:
  - a. Click Modify Service. The detail fields become enabled.
  - b. Enter or update the appropriate information, and click Save.

Figure 10: Maintain Services – modify mode

15. Click the **Document** tab. The Maintain Documents screen appears.
  - a. Click Modify Document.
  - b. Enter the date the Initial Packet was sent in the **Sent Date** field.
  - c. Enter any document-related **Comments**, and click Save.



Figure 11: Maintain Documents – modify mode

16. Once all initial enrollment information is verified/completed, select 'Approve' in the **Actions** list.

**Note:** As the initial enrollment moves through the approval process, the **Actions** list options change depending upon the logged in user's role. Please reference [Table 1](#) below for additional initial enrollment **Actions** information.

17. Click **Submit**.

**Notes:**

- If errors exist on any tab, the HAB application provides a comprehensive list of all the issues using red text on the current tab. Navigate to the associated screen(s), correct the issue(s), and resubmit.
- The HAB application automatically moves the case to the appropriate work queue based on the submitting worker's role. For example, if the initial enrollment resides in the PIHP work queue, upon PIHP approval the case automatically moves to the MDCH work queue for final review and approval.
- The HAB application sends the following email notification to the appropriate worker (if CMH or PIHP):

"This is an automated email generated by WSA system to notify that there is a HSW case in your Work Queue.

Case ID: <case identification number>  
Current Work Queue: <CMH or PIHP>  
Case Transfer Type: <associated type>"

**Note:** The Case ID is a unique system-generated number, relevant to the HAB application, which can be used to search for the case.

**Note:** The Case Transfer Type reflects the value selected in the **Actions** list.

User	Action
PIHP	<b>Approve:</b> Moves the initial enrollment to the MDCH work queue
	<b>Send back to CMH:</b> Sends the initial enrollment to CMH for additional work prior to further approval
	<b>Withdraw:</b> Indicates the beneficiary withdrew their HAB enrollment prior to initial enrollment approval
MDCH	<b>Approve:</b> Finalizes the initial enrollment, moves the case to the HAB production system, updates the status to 'Open', and updates the work queue value to 'Completed'
	<b>Reject:</b> Indicates the case is inappropriate for HAB enrollment
	<b>Send back to CMH:</b> Sends the initial enrollment to CMH for additional work prior to further approval
	<b>Send back to PIHP:</b> Returns the initial enrollment to PIHP for additional work prior to further approval
	<b>Withdraw:</b> Indicates the beneficiary withdrew their HAB enrollment prior to initial enrollment approval

Table 1: HAB Initial Enrollment Actions

## 6 Maintaining Case Details

**Purpose:** The purpose of this quick reference guide (QRG) is to assist workers with maintaining 'Open' case details in the Habilitation Support (HAB) application. Common updates include adding service information or annual certification details.

The HAB application consists of the pending environment and the production system. Case information is entered into the pending environment; after the appropriate approval is recorded, the pending information becomes live data in the production system.

Upon accessing the pending environment, the **Pending** button turns gray. Upon accessing the production system, the **Production** button turns gray. Additionally, the name of the tab currently in use (e.g., Enrollment, Comments) turns gray. Please reference [Figure 2](#) and [Figure 4](#) below.

### Steps:

Figure 1: HAB Beneficiary Search

1. Select **HAB > Beneficiary Search** in the top menu. The HAB Beneficiary Search screen appears.

2. Either enter the beneficiary's Medicaid ID in the **Beneficiary ID** field, the HAB **Case ID**, or enter a combination of other search criteria.

**Note:** The HAB **Case ID** is a unique system-generated number, relevant to the HAB application.

3. Click **Search**.
4. Click Prod View beside the beneficiary's record. The Maintain Enrollment screen appears, displaying the 'Open' case information as it currently appears in the HAB production system.

Figure 2: Maintain Enrollment – production system/Enrollment tab

5. Click each tab to view the production case information.

**Note:** Throughout the HAB application, click Return to Splash to access the Waiver Support Application (WSA) home screen.

Figure 3: WSA home screen (Splash page)

6. To access the pending environment and make case modifications:

**Note:** When making modifications, use the **Comments** functionality as a communication tool as the case moves between work queues. Please note that comments entered on any tab **other than** the **Comments** tab are not permanent; they can be modified or deleted.

- a. Click **Pending** in the **Change View** section.
- b. Click **Move to my Work Queue** in the **Actions** section.

Figure 4: Maintain Enrollment – pending environment/Enrollment tab

7. To make modifications on the **Enrollment** tab:
  - a. Click the **Enrollment** tab. The Maintain Enrollment screen appears.
  - b. Click Modify Enrollment. The detail fields become enabled.
  - c. Enter or update the appropriate information and click Save.

Figure 5: Maintain Enrollment – modify mode

**Note:** The initial enrollment's **Beneficiary ID** (Medicaid ID) *cannot* be modified. In situations where the beneficiary's Medicaid ID changes, **End Date** the record containing the old **Beneficiary ID**; then add an enrollment record using the new **Beneficiary ID** and a **Begin Date** one day after the previous record's **End Date**.



**Caution:** You can search for the beneficiary using only the *current* Medicaid ID; however you can also search using the beneficiary’s name and/or case ID if the new Medicaid ID is unknown.

**Note:** When a beneficiary moves from one Community Mental Health (CMH) to another CMH within the same Prepaid Inpatient Health Plan (PIHP), the PIHP worker has the ability to record the move using the **CMH Name** field on the Maintain Enrollment screen.

8. To make modifications on the **Certification** tab:
  - a. Click the **Certification** tab. The Maintain Certification screen appears.
  - b. Click Modify Certification. The detail fields become enabled.
  - c. Enter or update the appropriate information and click Save.

Figure 6: Maintain Certification – modify mode

9. To make modifications on the **Consent** tab:
  - a. Click the **Consent** tab. The Maintain Consent screen appears.
  - b. Click Modify Consent. The detail fields become enabled.
  - c. Enter or update the appropriate information and click Save.

Figure 7: Maintain Consent – modify mode

10. To make modifications on the **Status** tab:
  - a. Click the **Status** tab. The Maintain Status screen appears.
  - b. Click Modify Status. The detail fields become enabled.
  - c. Enter or update the appropriate information and click Save.

Figure 8: Maintain Status – modify mode

11. To enter a comment, click the **Comments** tab. The Maintain Comments screen appears.  
**Note:** Comments entered on the **Comments** tab are a permanent part of the case record; they **cannot** be modified or deleted. These comments must be grammatically correct, reflect only the facts, and written using professional language.

**Tip:** Use the **Comments** functionality to capture information that needs to remain permanently with the case (e.g., a transfer between two PIHPs).

- Click Add-New-Comment. The **Comments** field appears.
- Enter a detailed comment.
- Click Add-New-Comment to save the information; the new comment appears in the Comment List.

Figure 9: Maintain Comments – add mode

12. To make modifications on the **Service** tab:

- Click the **Service** tab. The Maintain Services screen appears.
- Click Modify Service. The detail fields become enabled.
- Enter or update the appropriate information and click Save.

Figure 10: Maintain Services – modify mode



13. To make modifications on the **Document** tab:
  - a. Click the **Document** tab. The Maintain Documents screen appears.
  - b. Click Modify Document. The detail fields become enabled.
  - c. Enter or update the appropriate information and click Save.

Figure 11: Maintain Documents – modify mode

**Note:** A 'P' displays on each tab containing pending/newly updated case information, indicating the information must be approved.

14. Select 'Approve' in the **Actions** list.

**Note:** After initial enrollment:

- All case updates made by a Community Mental Health (CMH) worker require additional approval by the Prepaid Inpatient Health Plan (PIHP) with the exception of updates to the Service tab or the Comments tab
- Only case updates made by a PIHP worker on the following tabs require additional approval: Enrollment, Document, and Disenrollment

**Note:** As the case moves between work queues, the **Actions** list options change depending upon the logged in user's role. Please reference [Table 2](#) below for additional ongoing case **Actions** information.

**Note:** The 'Reset' option in the **Actions** list allows you to "erase" all pending data and "start over" using current HAB production system values. This option is only available on an 'Open' case (i.e., after initial enrollment approval) before final approval.

15. Click **Submit**.

**Note:** If additional approval or work (i.e., **Actions** = 'Send back to <CMH or PIHP>') is required, the HAB application automatically moves the case to the appropriate work

queue and sends the following email notification to the associated worker (if CMH or PIHP):

“This is an automated email generated by WSA system to notify that there is a HSW case in your Work Queue.

Case ID: <case identification number>

Current Work Queue: <CMH or PIHP>

Case Transfer Type: <associated type>”

User	Action
CMH	<b>Approve:</b> If modifications were made on the Service tab and/or the Comments tab, moves the updates to the HAB production system; for <i>all other</i> modifications, moves the case to the PIHP work queue for additional approval
	<b>Reset:</b> Removes all pending data without saving, resetting the case details to the current HAB production system values
PIHP	<b>Approve:</b> If modifications were made on the Enrollment tab and/or the Document tab, moves the case to the MDCH work queue for additional approval; for <i>all other</i> modifications, moves the updates to the HAB production system
	<b>Reset:</b> Removes all pending data without saving, resetting the case details to the current HAB production system values
	<b>Send back to CMH:</b> Returns the case to CMH for additional work prior to further approval
MDCH	<b>Approve:</b> Finalizes the modifications, moves the updates to the HAB production system, and updates the work queue value to ‘Completed’
	<b>Reset:</b> Removes all pending data without saving, resetting the case details to the current HAB production system values
	<b>Send back to CMH:</b> Returns the case to CMH for additional work prior to further approval
	<b>Send back to PIHP:</b> Returns the case to PIHP for additional work prior to further approval

Table 2: HAB Ongoing Case Actions

16. To delete a record on the Enrollment, Certification, Consent, Status, Service, or Document tab:

**Note:** The initial enrollment record *cannot* be deleted.

**Note:** CMH workers *do not* have the ability to delete any records on the **Document** tab.

- a. Select the tab.
- b. Click Modify <associated tab's purpose>.
- c. Click Delete beside the appropriate record. The message “Are you sure you want to delete?” appears.
- d. Click **OK**.

**Note:** A ‘P’ displays on each tab containing deleted case information, indicating the deletions must be approved.

- e. Select ‘Approve’ in the **Actions** list.
- f. Click **Submit**.

**Note:** If additional approval or work is required, the HAB application automatically moves the case to the appropriate work queue and sends the email identified above.

## 7 Disenrolling a HAB Beneficiary

**Purpose:** The purpose of this quick reference guide (QRG) is to assist workers with disenrolling a Habilitation Support Waiver beneficiary in the Habilitation Support (HAB) application. All disenrollment requests require Michigan Department of Community Health (MDCH) approval.

### Steps:

Figure 1: HAB Beneficiary Search

1. Select **HAB > Beneficiary Search** in the top menu. The HAB Beneficiary Search screen appears.
2. Either enter the beneficiary's Medicaid ID in the **Beneficiary ID** field, the HAB **Case ID**, or enter a combination of other search criteria.  
**Note:** The HAB **Case ID** is a unique system-generated number, relevant to the HAB application.
3. Click **Search**.
4. Click Pending View beside the beneficiary's record. The Maintain Enrollment screen appears.
5. Click **Move to my Work Queue** in the **Actions** section.
6. Click the **Disenroll** tab. The Maintain Disenrollment screen appears.

The screenshot shows the MDCH Department of Community Health website. The navigation bar includes links for Home, Training, HAB, Person, Reports, Print, Contact, and Exit. Below the navigation bar, there are input fields for Beneficiary ID, Beneficiary Name, and Status (Open, Work Queue, PIHP, More-Info). A series of tabs (Enrollment, Certification, Consent, Status, Comments, Service, Document, Disenrollment) are visible, with 'Disenrollment' currently selected. On the left, a 'Change View' dropdown is set to 'Production', and a 'Pending' button is next to it. An 'Actions' dropdown is set to '\*\* Please Select', followed by a 'Submit' button. The main form area is titled 'Disenrollment' and contains several fields: 'Notified Date' (text input), 'Disenrollment Date' (text input), 'Disenrollment Reason' (dropdown menu set to '\*\* Please Select'), 'Hearing Indicator' (checkbox), and 'Comments' (text area). At the bottom of the form, there are links for 'Disenroll-Case' and 'Help'. The footer of the page contains various links including Michigan.gov Home, MDCH Home, Contact MDCH, State Web Sites, Privacy Policy, Link Policy, Accessibility Policy, Security Policy, Michigan News, and Michigan.gov Survey, along with a copyright notice for 2001-2011 State of Michigan.

Figure 2: Maintain Disenrollment

7. Enter the **Notified Date** when selecting 'Involuntary Disenrollment', 'Nursing Facility', 'OTHER', or 'Voluntary Disenrollment' as the **Disenrollment Reason**.

**Note:** The **Notified Date** must be at least twelve (12) days in advance of the **Disenrollment Date**.

8. Enter the **Disenrollment Date**.
9. Select the reason for disenrollment in the **Disenrollment Reason** list.
10. Select the **Hearing Indicator** check box, if appropriate.

**Note:** Once the disenrollment has been approved and the case closed, a MDCH worker can access the closed case and select the **Hearing Indicator** check box (check = Yes); this is the *only* update allowed, no other changes can be made on a closed case. The Prepaid Inpatient Health Plan (PIHP) is responsible for notifying MDCH when a hearing is requested.

11. Enter detailed **Comments** explaining the reason for HAB disenrollment.

**Note:** The **Comments** field is required when selecting 'Involuntary Disenrollment' or 'OTHER' as the **Disenrollment Reason**.

12. Click Disenroll-Case. The HAB application automatically:

- Sets the **End Date** to the **Disenrollment Date** on the **Enrollment**, **Certification**, and **Consent** tabs
- Sets the current **Status** tab record's **End Date** to one (1) day prior to the **Disenrollment Date**

- Creates a new **Status** tab record with a **Begin Date** and **End Date** equaling the **Disenrollment Date**, a **Status** of 'Inactive', and a **Reason** of 'Disenrolled'

13. Select 'Approve' in the **Actions** list.

**Note:** If additional approval or work (i.e., **Actions** = 'Send back to <CMH or PIHP>') is required, the HAB application automatically moves the case to the appropriate work queue and sends the following email notification to the associated worker (if CMH or PIHP):

"This is an automated email generated by WSA system to notify that there is a HSW case in your Work Queue.

Case ID: <case identification number>

Current Work Queue: <CMH or PIHP>

Case Transfer Type: <associated type>"

## 8 Generating Reports

**Purpose:** The purpose of this quick reference guide (QRG) is to assist workers with generating reports in the Habilitation Support (HAB) application. Report accessibility depends upon the worker’s assigned security role.

### Steps:

ProgramName	Default Format	Description	Run Report	Report Hidden
HAB Disenrollments.rpt	[Icon]	Disenrollment Report	<a href="#">PDF</a>   <a href="#">Excel</a>   <a href="#">Word</a>	
HAB EnrollmentByMonth.rpt	[Icon]	Enrollment By Month for PIHP/CMH	<a href="#">PDF</a>   <a href="#">Excel</a>   <a href="#">Word</a>	
HAB InactiveBeneficiaries.rpt	[Icon]	Shows inactive beneficiaries	<a href="#">PDF</a>   <a href="#">Excel</a>   <a href="#">Word</a>	
HAB NewEnrollmentByMonth.rpt	[Icon]	New Enrollments By Month for PIHP/CMH	<a href="#">PDF</a>   <a href="#">Excel</a>   <a href="#">Word</a>	
HAB PastDue.rpt	[Icon]	Shows list of past due beneficiaries for Certification, consent and service.	<a href="#">PDF</a>   <a href="#">Excel</a>   <a href="#">Word</a>	
HAB PendBack.rpt	[Icon]	Pend back report	<a href="#">PDF</a>   <a href="#">Excel</a>   <a href="#">Word</a>	
HAB PIHPContactList.rpt	[Icon]	The HAB Contact List Report	<a href="#">PDF</a>   <a href="#">Excel</a>   <a href="#">Word</a>	
HAB PotentialMonthlyRecoupments.rpt	[Icon]	Potential Monthly Recoupments	<a href="#">PDF</a>   <a href="#">Excel</a>   <a href="#">Word</a>	
HAB ProcCodeMaint.rpt	[Icon]	Procedure Codes maintenance Report	<a href="#">PDF</a>   <a href="#">Excel</a>   <a href="#">Word</a>	
HAB ProspectiveEnrollment.rpt	[Icon]	HAB Prospective Enrollment Report	<a href="#">PDF</a>   <a href="#">Excel</a>   <a href="#">Word</a>	

**Action** [Help](#)

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Figure 1: Reports

1. Select **Reports** in the top menu. The Reports screen appears.
2. Select 'HAB' in the **Program** list. The Habilitation Support Waiver reports display.
3. Each report can be generated in multiple formats; click [PDF](#), [Excel](#), or [Word](#) beside the desired report. The parameter screen appears.
4. Enter the required information per the parameter prompts.

**Note:** The report format can also be selected/changed on the parameter screen.



Figure 2: Parameter screen example

- Click Generate Report. The report disclaimer appears.

Figure 3: Report Disclaimer

- Click Agree to continue. A separate report viewer window appears, displaying the report results.

Figure 4: Example report

- Use the command buttons at the bottom to save and/or print the report.



## 9 Updating User Assignment

**Purpose:** The purpose of this quick reference guide (QRG) is to assist Prepaid Inpatient Health Plan (PIHP) workers with updating a worker's Community Mental Health (CMH) when the worker moves between CMHs within the same PIHP.

### Steps:

**HAB User Assignment**

PIHP: **\*\* Select All** ▼  
 Filter CMH: **\*\*Select** ▼  
 Show Hidden: **Active only** ▼ **Filter**

List of Users as per filter criteria

PIHP/CMH	User Name	PIHP User	WSA Coordinator	PIHP Contact	CMH Contact	Hidden
Access - Montcalm		No	No	No	No	No <a href="#">Edit</a>
Access - Montcalm		No	No	Yes	No	No <a href="#">Edit</a>
Access - Montcalm		Yes	No	No	No	No <a href="#">Edit</a>
Access - Montcalm		No	No	No	No	No <a href="#">Edit</a>
Access - Tuscola		No	No	No	No	No <a href="#">Edit</a>
<b>** Select one</b> ▼	<b>** Select one</b> ▼	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> <b>Add</b>

**Message Action** [Return to Splash](#) [Help](#)

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Figure 1: User Assignment

1. Select **HAB > HAB User Assignment** in the top menu. The User Assignment screen appears, displaying only workers within the logged in user's PIHP.
2. Locate the **User Name** for whom the update is needed and click [Edit](#) beside the record. The associated check boxes become enabled.
3. Select the **Hidden** check box and click **Save**. This hides the worker's old record from view, allowing a new PIHP/CMH association to be made.
4. At the bottom of the **PIHP/CMH** column, select the worker's new PIHP/CMH combination from the list.
5. At the bottom of the **User Name** column, select the worker from the list.
6. If the worker is a PIHP worker, select the **PIHP User** check box.
7. If the worker is the WSA coordinator, select the **WSA Coordinator** check box.  
**Note:** A PIHP can only have one WSA coordinator.
8. If the worker is a PIHP contact person, select the **PIHP Contact** check box.



9. If the worker is a CMH contact person, select the **CMH Contact** check box.
10. Click **Add**.