Children's Long-Term Support (CLTS) Waiver Program
Eligibility and Enrollment Streamlining (EES) Reports

OnBase Reports

OnBase Reports are:
- Available in the ForwardHealth Portal from the "Reports" link.
- Updated monthly.
- Sorted by the first and then second columns, CR, Master Client Index (MCI).
- In a static text format that can be printed; cannot be sorted; can be copied and pasted, but not imported directly into Excel.

Updated	Description	Data Included	Suggested Uses
Total Member List Report			
1st of the month	Displays all of the waiver agency's enrolled CLTS Waiver Program participants for the previous month. Only includes participants with active and/or suspended enrollment during the month. Includes total number enrolled at the bottom of the report.	• Identifying information: MCI, name, date of birth (DOB) • Effective and end dates: enrollment segment start and end dates (may show the 12/31/2299 high date) • Waiver program recertification due dates • Status: **A**ctive or **S**uspend • Level of Care (LOC) effective and end dates: dates functional eligibility was determined and rescreen is due • Target group(s)	A printable roster of enrolled participants. Quickly check the total number of participants enrolled. Track functional eligibility rescreen and program recertification due dates. Periodically review to confirm the accuracy of the participant roster, including rescreen and recertification due dates.
Enrollment Change Report			
1st of the month	Displays all of the changes to a waiver agency's enrollment that took place during the previous month. Includes new enrollment segments (that is, initial enrollments and reenrollments), suspensions, and disenrollments.	• Identifying information: MCI, name, DOB • Enrollment effective and end dates • Status: **A**ctive, **S**uspend, or **I**nactive (A = active enrollment segment; S = suspended enrollment; I = inactivated/ deleted record)	A printable list of all children who had a change in their enrollment during the previous month. Use for oversight and to audit changes to agency enrollments.

Updated	Description	Data Included	Suggested Uses
	Also displays records that were inactivated in the last month.	• Type of change: **I**nitial or **U**pdate (I = new enrollment segment; U = change to an existing enrollment)	**NOTE:** Participants who were disenrolled will show an Active (A) status. The dates reflect an active enrollment segment, even if the participant was disenrolled. Look for an end date and end reason code to confirm an enrollment ended.

Disenrollment Report for Waiver Agencies

Updated	Description	Data Included	Suggested Uses
1st of the month	Displays participants whose enrollment ended during the previous month. Includes both manual and automated disenrollments (that is, waiver agency-entered and system-generated stop reasons). Also includes participants with a suspension that had an end date during the previous month.	• Identifying information: MCI, name, DOB • Enrollment effective and end dates • Stop reason code and text (that is, the end reason) • Status: **A**ctive or **S**uspend	A printable list of participants who were disenrolled or who had a suspension end date during the previous month. Can be used for monitoring and to verify the accuracy of the waiver agency's disenrollment records. **NOTE:** Participants who were disenrolled will show an Active (A) status. The dates reflect an active enrollment segment, even if the participant was disenrolled. Look for an end date and end reason code to confirm an enrollment ended.

Link Report for Waiver Agencies

Updated	Description	Data Included	Suggested Uses
1st of the month	Displays any participant with more than one ID whose records were linked during the previous calendar month. The MAID (that is, first ID number on the report) is the correct, active participant MCI.	• Identifying information: MCI, name, DOB • Previous MCI (that is, the ID that is no longer being used)	**NOTE:** OnBase reports only appear if there is data to report. This report should rarely appear. Use to identify participants who may have had an MCI change. If an MCI changed, the waiver agency must check that authorizations and claims have the correct MCI, submit updated authorizations to the CLTS third-party administrator, Wisconsin Physicians Service (WPS), as necessary. It may be necessary to contact WPS to resolve errors resulting from the corrected MCI.

Updated	Description	Data Included	Suggested Uses
Predictive Disenrollment Report			

Two days after adverse action	Displays participants who are **scheduled to be disenrolled** at the end of the current month and at the end of the next calendar month.
	
	NOTE: Currently EES does **not** automatically disenroll participants, except for those who are aging out at 22 years.
	
	Displays the date participants are predicted to be disenrolled due to: losing Medicaid, needing an annual functional screen, a loss of functional eligibility, participant aging out of the program, and/or having a program recertification due date that falls within the reporting period (that is, current or next month).
	
	See link for monthly adverse action dates:
	https://dwd.wisconsin.gov/des/calendar/
		• Identifying info: MCI, name, DOB
		• Predicted end dates for:
		  o Medicaid (that is, Medicaid ending)
		  o LOC (that is, annual functional screen due)
		  o Ineligible LOC (that is, loss of functional eligibility)
		  o Aging out (that is, last day of the month in which the youth turns 22 years)
		  o Recertification date (that is, annual program recertification due)
			Must be reviewed monthly to monitor and ensure correct disenrollments:
			1) Identify participants who are scheduled to be disenrolled.
			2) Take appropriate action to ensure eligible participants are not disenrolled.
			3) Use to verify which participants will appropriately be disenrolled.
			
			Use for planning to complete timely recertifications.
			
			Use for identifying transition planning with youth who are aging out of the CLTS Waiver Program.

Data Warehouse Reports

Data Warehouse (also called "Business Objects") Reports are:
- Available in the agency's folder through the Business Objects Webi interface: https://bo.forwardhealth.wi.gov/.
- Updated weekly.
- In Excel or can be exported and saved in Excel.
- Sortable and printable.

Updated	Description	Data Included	Suggested Uses
CLTS Waiver Enrollment Report			
Every Monday by 10:00 a.m.	Excel spreadsheet displays participants who were enrolled with a waiver agency during the previous week. Includes participants with suspended enrollments.	• Identifying information: MCI, name, DOB • CARES case number • Contact information: address and phone number • Enrollment information: effective and end dates (may show the 12/31/2299 high date) • Status: **A**ctive or **S**uspend • Up to three Medicaid benefit plans (that is, Medicaid subprogram), including effective and end dates **NOTE**: Benefit plans are listed in no particular order under the headings "Primary," "Secondary," and "Tertiary Benefit Plan." • Katie Beckett Program enrollment information, including effective and end dates	Provides a printable, sortable, filterable list of the agency's enrolled participants that is updated weekly. Use to track, verify, and/or audit enrollment. Use to verify addresses where letters will be sent. The agency that is the participant's source of Medicaid must be contacted in order to change an incorrect address (for example, Child Protective Services Unit, Income Maintenance Consortia, Social Security Administration). Use to track sources of Medicaid and when a participant's Medicaid needs to be renewed. Can run weekly to verify Medicaid renewals are being completed.

Updated	Description	Data Included	Suggested Uses
Re-Screen Eligibility and Enrollment Streamlining Report			
New data is loaded on weekends. Waiver agencies must click "Refresh Data" in the upper right-hand corner to view an updated report.	Business Objects report with multiple tabs that can be saved as an Excel spreadsheet. Each of the following tabs displays the agency's participants with the associated characteristic: • Screen past due • Screen due now (current month) • Screen due in 1-3 months • Screen due in 4-6 months • Aging out (youth 17.5 to 18 years) • Over 18 (youth 18 to 22 years) • Enrolled within last 90 days • Disenrolled last month • Disenrolled current month • Disenrolled next month	Data included in the report is taken from both FSIA and EES. Data from FSIA: • Identifying information: MCI, name, age, DOB • Screener name and waiver agency • Months since last screen • Screen calculated date • Screen due date **NOTE**: The report currently shows the screen due date as 365 days from the last screen. Follow the policy that the screen is due by the end of the month every 12 months. • Target group(s) Data from EES: • CLTS Waiver Program enrollment effective and end dates (may show the 12/31/2299 high date) • Actual end dates appear for both manual and automated disenrollments • Recertification completion and due dates • County of fiscal responsibility	Identify participants who are due (and overdue) for annual functional screens. Plan ahead for rescreens that are coming due. Use for youth in transition planning: 1) Identify youth who are more than 17.5 years old and verify that, when appropriate, they have been referred to the aging and disability resource center (ADRC). 2) Identify youth who are approaching their 22nd birthday to ensure appropriate transition planning. Verify new enrollments and reenrollments from the last 90 days. Verify that the correct participants were disenrolled during the previous calendar month. Verify the accuracy of and take action to prevent incorrect future disenrollments. Run the report weekly to verify progress on rescreens and other measures to prevent incorrect disenrollments.

Updated	Description	Data Included	Suggested Uses
Re-Certification Eligibility and Enrollment Streamlining Report			
New data is loaded on weekends.

Agencies must click "Refresh Data" in the upper right-hand corner to view an updated report. | Business Objects report with multiple tabs that can be saved as an Excel spreadsheet.

Each of the following tabs displays the agency's participants with the associated characteristic:
• Recertification over due
• Recertification due now (current month)
• Recertification due in 1-3 months
• Recertification due in 4-6 months
• Aging out (youth 17.5 to 18 years)
• Over 18 (youth 18 to 22 years)
• Enrolled within last 90 days
• Disenrolled last month
• Disenrolled current month
• Disenrolled next month | Data included in the report is taken from both Functional Screen Information Access (FSIA) and EES.

Data from FSIA:
• Identifying info: MCI, name, age, DOB
• Screener name and agency
• Months since last screen
• Screen calculated date
• Screen due date
• Target group(s)

Data from EES:
• CLTS Waiver Program enrollment effective and end dates (may show the 12/31/2299 high date)
• Actual end dates appear for both manual and automated disenrollments
• Recertification completion and due dates
• County of fiscal responsibility | Identify children who are due (and overdue) for annual waiver program recertifications.

Plan ahead for recerts that are coming due.

Use for transition planning:
1) Identify youth who are more than 17.5 years old and verify that, when appropriate, they have been referred to the ADRC.
2) Identify youth who are approaching their 22nd birthday to ensure appropriate transition planning.

Verify new enrollments and reenrollments from the last 90 days.

Verify that the correct children were disenrolled during the previous calendar month.

Verify the accuracy of and take action to prevent incorrect future disenrollments.

Run the report weekly to verify progress on recertifications and other measures to prevent incorrect disenrollments. |