



# Program of All-Inclusive Care For The Elderly (PACE)

## KLOCS Webinar for PACE Providers

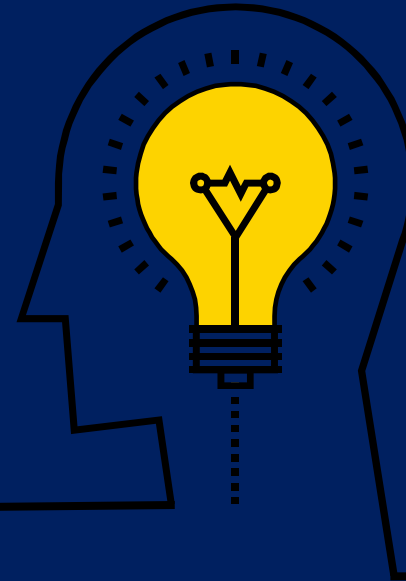
June 2023  
Part 1



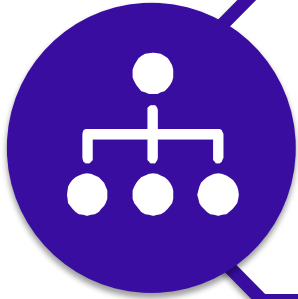
TOPIC	DESCRIPTIONS	
PACE Overview	<ul style="list-style-type: none"><li>• Purpose</li><li>• Features and Benefits</li></ul>	
Application Overview	<ul style="list-style-type: none"><li>• Overview of KLOCS, IEES, MMIS, and Individual ID</li></ul>	<ul style="list-style-type: none"><li>• Overview of Master Client Index</li><li>• Overview of Match Outcomes</li></ul>
Accessing KLOCS	<ul style="list-style-type: none"><li>• Kentucky Online Gateway (KOG) Overview</li></ul>	
System Navigation	<ul style="list-style-type: none"><li>• Overview of various screens within KLOCS</li><li>• Walkthrough of System Navigation</li></ul>	
Application Intake	<ul style="list-style-type: none"><li>• Walkthrough of the application process</li></ul>	
Application Management	<ul style="list-style-type: none"><li>• Application Outcomes</li><li>• LOC Start Dates</li></ul>	<ul style="list-style-type: none"><li>• Application Outcomes</li></ul>

TOPIC	DESCRIPTIONS
<b>Provider Tasks</b>	<ul style="list-style-type: none"><li>• LOI Task</li><li>• Semi-Annual Assessment</li><li>• Reassessment Reminder</li><li>• LOC Overlap</li><li>• Age Requirement Failure</li></ul>
<b>Long Term Care Facility</b>	<ul style="list-style-type: none"><li>• Overview of PACE and Long Term Care Facilities</li></ul>
<b>Ongoing Management</b>	<ul style="list-style-type: none"><li>• Overview of Discharges and Transfers</li></ul>
<b>Do This, Not That</b>	<ul style="list-style-type: none"><li>• Overview of scenarios within KLOCS and PACE</li></ul>

# PACE Overview



## OVERVIEW



The Department for Medicaid Services (DMS) is implementing PACE (Program of All-Inclusive Care for the Elderly), which is a **permanent provider type** under Medicare that allows states the option to pay for an Individual's PACE services. PACE participants are **not required to enroll in Medicaid** and may pay for PACE using private funds.

## PURPOSE



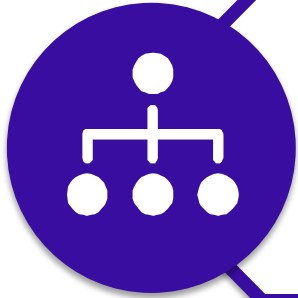
The purpose of PACE is to provide **an integrated model of care** for members age 55 and older who are otherwise eligible for nursing home care. This allows for the Individual to **access preventive and chronic care services while being able to remain in their home.**

## TIMELINE



PACE is set to go live in Summer 2022 and will be available in 19 counties, primarily in the Lexington, Somerset, and Bowling Green areas. PACE will expand to other counties as able.

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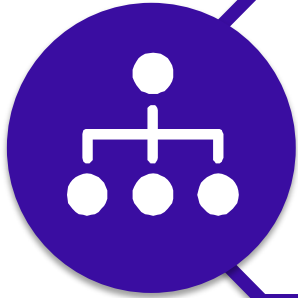
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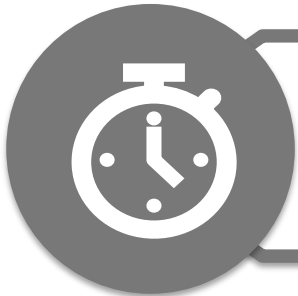
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To be eligible for PACE services, an Individual must:



**Live in the approved geographic area of the PACE organization**



**Be at least 55 years old or older**



**The PACE organization determines that the Individual can be cared for safely in the community**

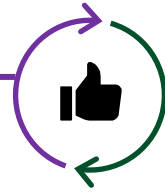


**Meet the Commonwealth of Kentucky's eligibility criteria for nursing home level of care**



## What is KLOCS?

- The Kentucky Level of Care System (KLOCS) is the **singular system of record keeping for Medicaid Level of Care (LOC) applications** for all stakeholders involved in the LOC application, review, and approval processes.
- Nursing Facilities, Institutionalized Hospice Service Providers, ICF-IIDs, and PACE Providers use KLOCS to enter and manage Medicaid Member LOCs. **Application submission requirements, tasks, task completion timelines, and functionality varies between the different Provider types.**
- There are various application roles in KLOCS. Each facility has PACE Providers whom are assigned the “Provider Staff” role.



## What is the relationship with PACE?

- PACE LOC Applications should be **submitted in KLOCS by PACE Providers for Medicaid (MA) Members and those pending MA Eligibility.** Medicare only and Private Pay do not need to have a PACE LOC Application entered in KLOCS.
- **PACE is month-pure**, meaning that all services begin on the 1<sup>st</sup> of each month for Participants. All applications entered and approved may begin PACE Services the 1<sup>st</sup> of the month after approval (i.e., PACE application approved on July 25, PACE Services may begin on August 1).

**Please Note:** PACE services provided prior to the LOC Effective Start Date **will not** be reimbursed by Medicaid.

KLOCS allows stakeholders to interact electronically through Tasks and Notifications during LOC application processes.

## Providers

RESPONSIBILITIES

- Completes PACE applications for Individuals
- Manages Individual PACE LOC applications

TASKS & NOTIFICATIONS

- Triggers review tasks for the PACE PRO by submitting LOC applications
- Receives electronic notifications regarding updates to each LOC application (under review, review complete) and LOC determinations
- May receive tasks from the appropriate review organization or Department for Medicaid Services (DMS)

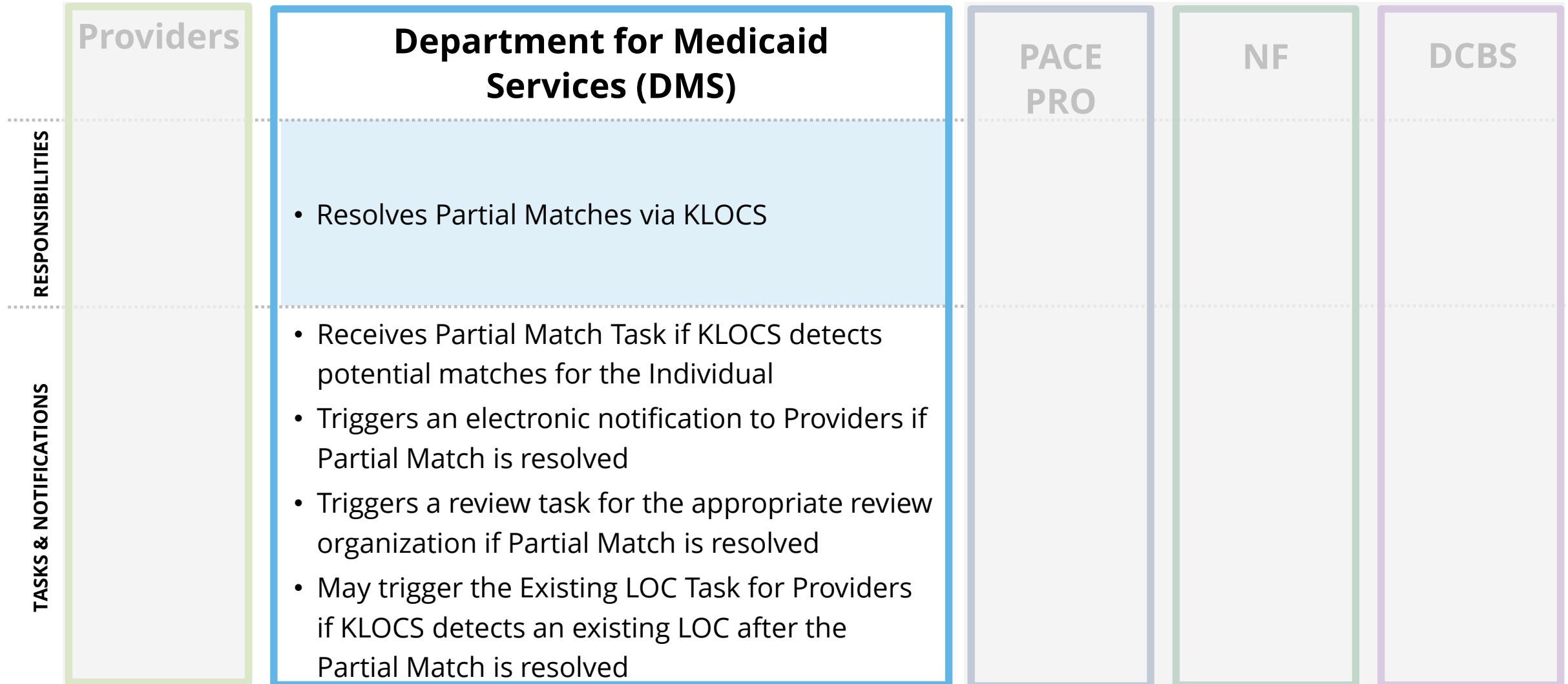
DMS

PACE  
PRO

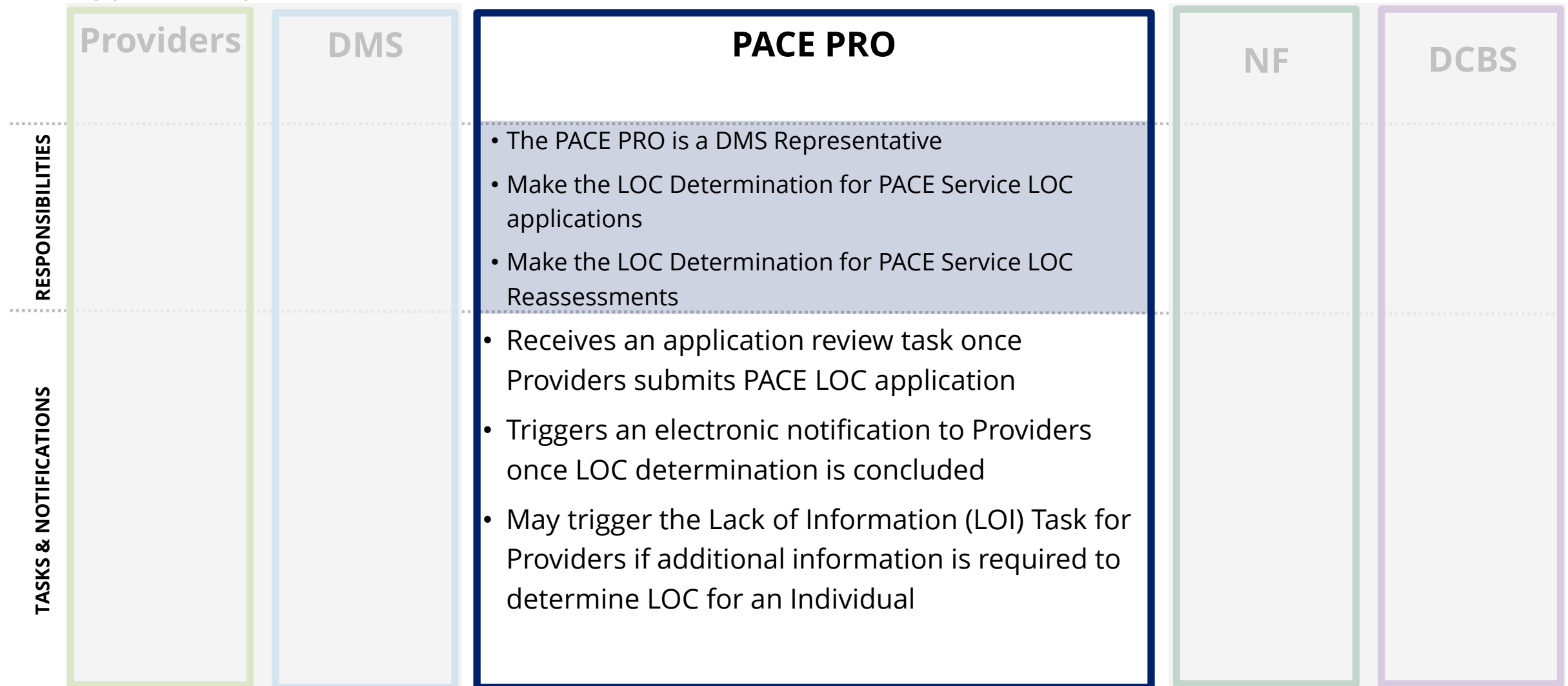
NF

DCBS

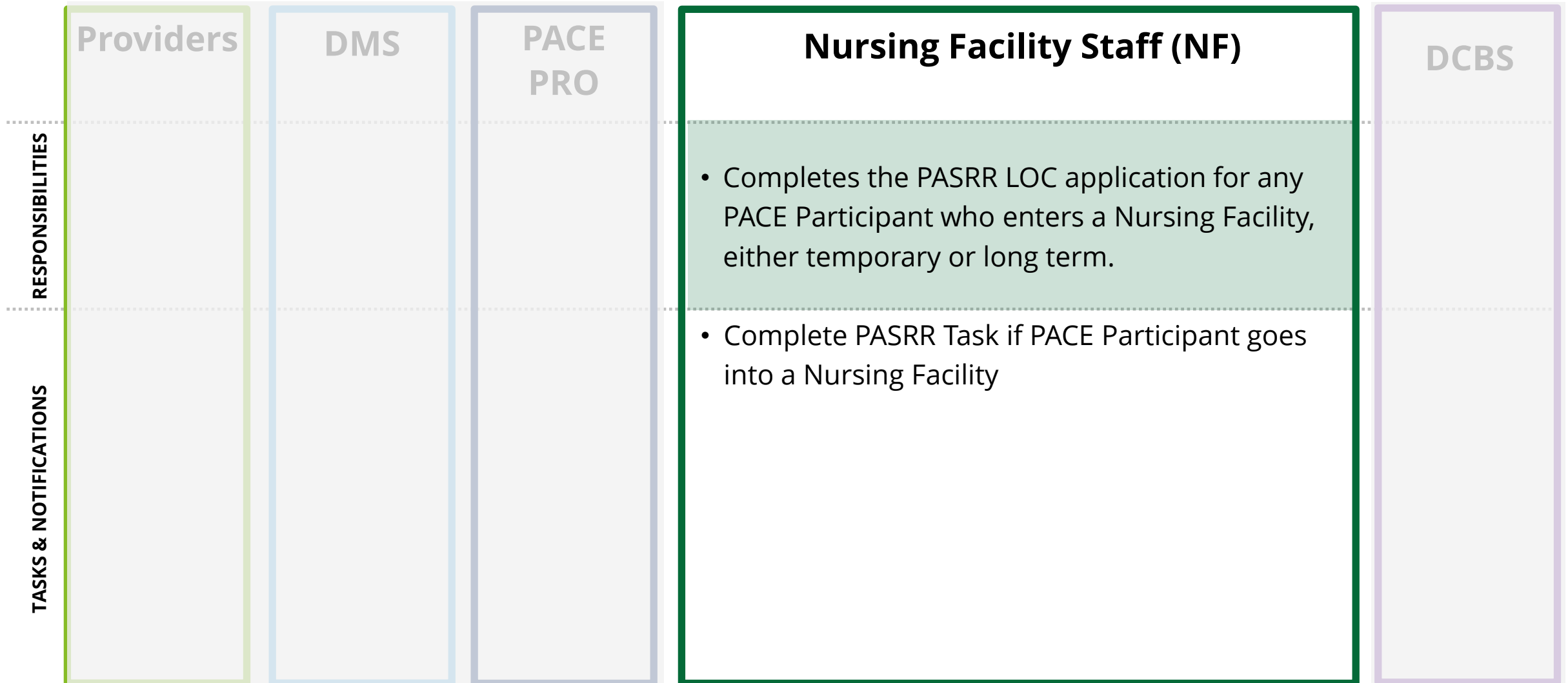
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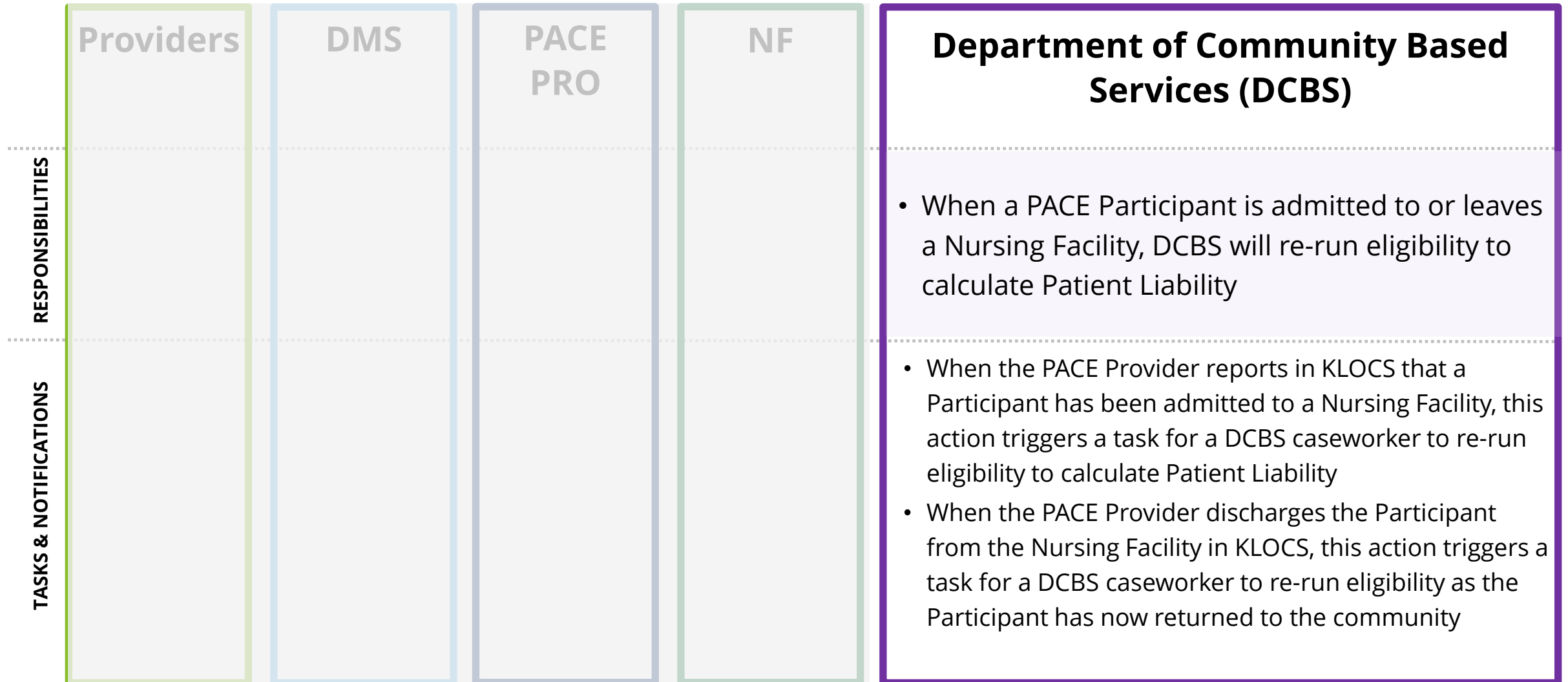
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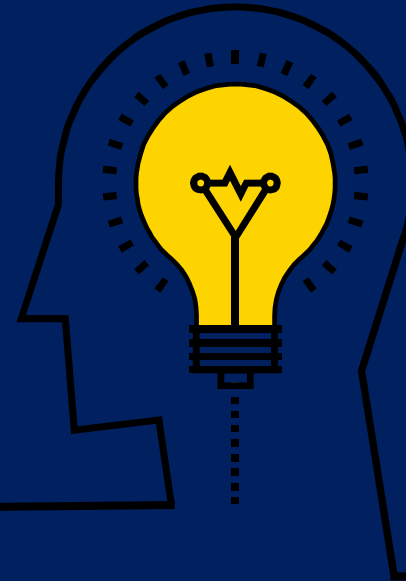


# PACE User Role Matrix



Application Life Cycle	PACE Provider	PACE PRO	DMS Staff	Nursing Facility	DCBS
Entering an LOC Application	✓				
Complete the Partial Match Task			✓		
Making the LOC Determination		✓			
Complete the LOI Task	✓				
Completing the Semi-Annual Task	✓				
Completing the Annual Assessment Reminder Task	✓				
Review the Annual Assessment		✓			
Enter PACE Member Transfers/Discharges	✓				
Reporting Institutionalization (i.e., the PACE Participant goes into a nursing facility)	✓				
[If PACE Participant goes into a nursing facility] Complete PASRR Task				✓	
[If PACE Participant goes into a nursing facility] Calculate Patient Liability					✓

# Application Overview





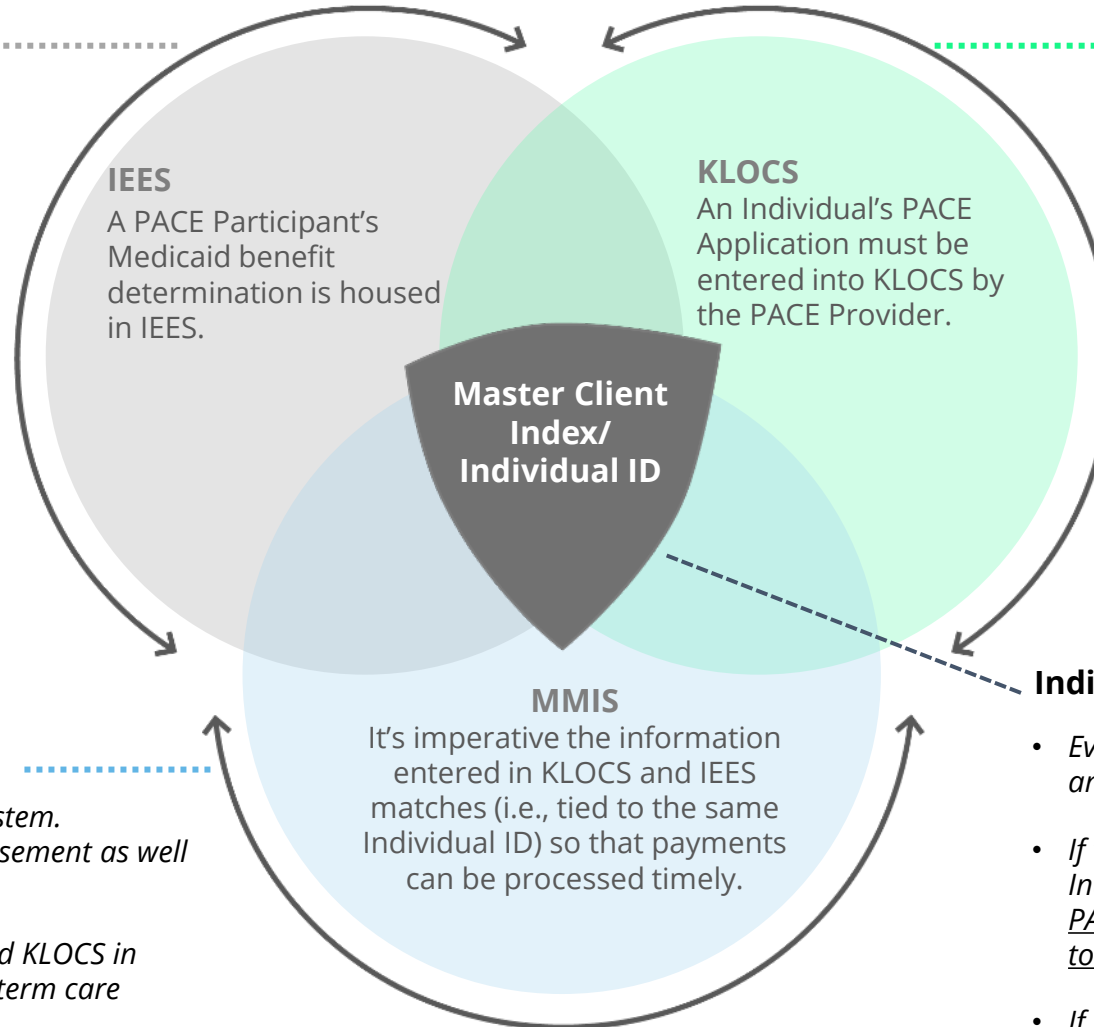
While IEES, MMIS, and KLOCS are separate systems, they are all tied to the Individual ID and work in unison to ensure the services are covered by the correct Provider.

## Integrated Eligibility and Enrollment Solution (IEES)

- IEES determines eligibility and enrollment for several state programs including Medicaid, Child Care, and SNAP.
- IEES includes a public facing self-service portal known as kynect benefits and a Worker Portal used by DCBS eligibility caseworkers.
- Enables timely processing of critical benefits; reduces redundant applications and data entry; improves data integrity.

## Medicaid Management Information System (MMIS)

- MMIS is a claims processing and retrieval system. It supports both fee for service (FFS) reimbursement as well as managed care programs.
- MMIS utilizes information from both IEES and KLOCS in determining payments to Providers for long term care services rendered to Medicaid Members.



## Kentucky Level of Care System (KLOCS)

- KLOCS is the source of truth for all Level of Care (LOC) applications for Medicaid Members and those pending Medicaid Eligibility.
- It's a platform for all stakeholders involved in the LOC application, review, and approval process and enables stakeholders to interact electronically via Tasks and Notifications.
- KLOCS is used by PACE Providers, Nursing Facilities, Institutionalized Hospice Service Providers, and Intermediate Care Facilities to enter and manage LOC applications.

## Individual ID

- Every Individual who applies for benefits via IEES and/or has an LOC entered in KLOCS is assigned an Individual ID.
- If the demographic information entered matches an existing Individual ID then the benefits and/or LOC are linked. The PACE Participant's LOC and Medicaid benefits need to be tied to the same Individual ID.
- If incorrect demographic information is entered, then the LOC and or Medicaid benefits may not get linked to the same Individual ID. This will delay services and/or payments.<sup>17</sup>

As an Individual's information is entered by the Provider during the LOC application intake, KLOCS utilizes the Master Client Index (MCI).

**The Master Client Index (MCI)** is a centralized database that uses elements specific to an Individual to check if they currently exist in the Commonwealth's Integrated Eligibility and Enrollment System (IEES). MCI is utilized by the state to confirm Individuals are correctly linked between systems.

The MCI checks for possible matches using the following elements entered by the Provider during LOC application intake:

FIRST NAME

LAST NAME

DATE OF BIRTH

GENDER

SOCIAL SECURITY NUMBER

*MCI Match Outcomes:*



## Full Match

The MCI locates a perfect match with an already existing Individual in IEES.

An **existing Individual ID** is returned by the MCI and the LOC application will be associated with that Individual ID.



## No Match

The MCI was unable to find a match with any existing Individual in IEES.

A **new Individual ID** is created for this Individual and their information is updated in IEES.



## Partial Match

The MCI locates multiple potential matches with existing Individuals in IEES. A Partial Match task is sent to DMS.

A **temporary Individual ID** is created. This temporary Individual ID is updated after DMS resolves the Partial Match.

**Please Note:** Regardless of the Master Client Index (MCI) Match Outcome, the KLOCS user may still proceed with the LOC application intake.

## Accurate Social Security Number

- ✓ If the Social Security Number is not entered accurately, payment for services may be delayed from Medicaid. Best practice is to enter information exactly as it appears on the Social Security Card.

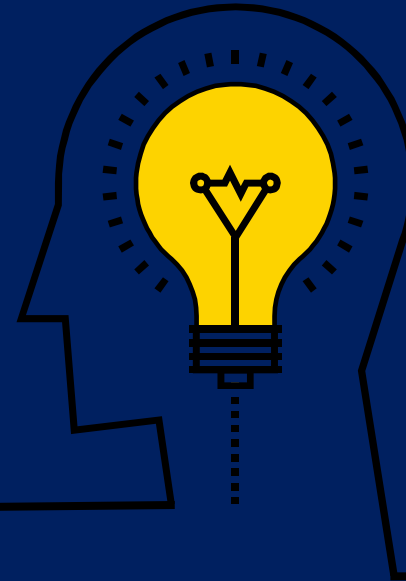
## MCI Partial Match

- ✓ If the MCI determines there is a Partial Match, review the application for accuracy and if the SSN or other identifiers are wrong, withdraw the application and submit a new one.

## Individual ID

- ✓ All information on the Individual is tied to their Individual ID, including benefits and payment for services.

# Access KLOCS



Before accessing the Kentucky Level of Care System (KLOCS), authorized Users must meet certain criteria.

## To access KLOCS, Users must meet the following criteria:



Users must be part of an **organization that handles Level of Care (LOC) applications and/or determinations**



Users are required to have a **Kentucky Online Gateway (KOG) account**



Users are required to complete **Multi-Factor Authentication (MFA)** when logging into the system

## **KOG Account Creation:**

### Access to KLOCS is by invitation only.

- Each facility has a KOG Organization Administrator (Org Admin) responsible for sending the invitation to the authorized users at their facility to create a KOG account to access KLOCS.
- KOG User Guides will be available on the DMS training page prior to go-live.

### Users with an existing KOG account can use the same account for KLOCS (except MWMA)

- The Individual must provide the facility's Org Admin with the email address tied to their existing KOG account.

**Please Note:** In order to create a KOG account, Users are required to provide personal information (e.g. Social Security Number, Date of Birth, etc.) for identity verification. This information is not stored.

**For any System Issues  
or  
KOG Questions:**



Contact  
**KLOCS Call Center**

**Phone Number:** 855-326-4650 - Select Option 2 (Providers) then Option 4 (KLOCS Technical Support)

**Email Address:**  
[Medicaidpartnerportal.info@ky.gov](mailto:Medicaidpartnerportal.info@ky.gov)

**Hours of Operation:**  
Monday - Friday 8am -5pm ET

**Please Note:** The KLOCS Call Center requests that any emails include KLOCS and a brief description of the issue in the subject line to help triage issues. Do not include any PHI (SSN, DOB, Medical History, etc.) in the email unless it is encrypted.

Providers must answer the following questions for identity verification purposes:

- First Name and Last Name
- Name of the Organization they work for
- Medicaid Provider ID of the Organization (Note: if a facility recently transferred ownership the Medicaid ID may have changed).

# System Navigation



# Dashboard Screen

The **Dashboard** screen is the default homepage in KLOCS for PACE Providers and is the first screen shown upon logging in to KLOCS. This screen will serve as the starting point for any work Providers perform in KLOCS, it is also where Providers can view all tasks for every Individual associated with their facility.

## In Top Navigation Panel:

- Click **Start Application** to begin a new application
- Click **LOC Management** to manage a discharge
- Click **Message Center** to view messages
- Click **Quick Search** to search for a PACE Participant or application

## In Quick Links:

- Click **Start New Application** to begin a new application for a PACE Participant
- Click **Manage Discharge** to navigate to the **Manage Discharge** screen
- Click **Member View** to search for a member

## In Tasks:

- View tasks in both the *My Tasks* and *Group Tasks* queue
- Navigate to *Group Tasks* to view and work tasks for the facility
- Navigate to *My Tasks* to view and work tasks assigned to you or ones that you have started

## In Applications:

- View an application that is in review
- Withdraw an application

The screenshot displays the KLOCS Dashboard interface. At the top, there is a navigation bar with links for Home, Start Application, LOC Management, Message Center (with a red notification badge '110'), and Quick Search. The user is identified as 'Welcome Asher Cora' with options for Sign Out and Help. The agency is listed as 'PT 34 Entity Comments'.

The main content area features a 'Dashboard' header and a 'Time Travel Date: 04/01/2022' section with a 'Change Time Travel Date' link. A 'Quick Links' sidebar on the left includes links for Start New Application, Message Center (110), View Announcements (26), Quick Search, LOC Management, Manage Discharge, View Reports, Other Links, Member View, FAQ, MAP Forms, Policy Documents, CHFS Website, and Page Help. A PDF icon for 'Get ADOBE READER' is also present.

A red announcement banner states: 'Unread Announcements - Click 'View Announcements' under Quick Links. As per KLOCS data records the Medicaid enrollment period for the provider you have logged in is currently past due. You are not supposed to start a new application unless the provider is in process or planning to continue participating as a KY Medicaid provider.'

Below the announcement is a table showing task counts:

	My Tasks	Group Tasks
Tasks Assigned	0	0
Due	0	0

There is also a 'Tasks' section with a 'Search Tasks' button. It includes a 'Select Queue' dropdown set to 'My Tasks' and a 'Filter Columns' dropdown set to '13- Selected'. Below this is a table with columns: Task Name, App #, Action, Provider #, Individual Name, and Program. The table currently shows 'No tasks available for this queue'. Buttons for 'View History', 'Mark As New', and 'Mark As Closed' are located below the table.

The 'Applications' section at the bottom contains a table with columns: Date Initiated, App #, Individual Name, Application Status, and Action.

Date Initiated	App #	Individual Name	Application Status	Action
04/01/2022	400152844	RIVERA, JOAN	PACE PRO Review	Withdraw



# Member View Screen

The **Member View** screen displays when a Provider clicks the **Member View** link under *Quick Links* on the **Dashboard** screen. All Individuals associated with a Provider are shown along with their LTC benefits status, LOC status, LOC start date, and Program Code.

Click the **Individual Name** to view the navigate the **Individual Summary** screen

### Quick Links

- [Start New Application](#)
- [Message Center](#) 189
- [View Announcements](#) 26
- [Quick Search](#)
- LOC Management**
- [Manage Discharge](#)
- [View Reports](#)
- Other Links**
- [Member View](#)
- [FAQ](#)
- [MAP Forms](#)
- [Policy Documents](#)
- [CHFS Website](#)
- [Page Help](#)

### Member View

Filter By:  Values:

Start Date:  End Date:

Members				
Individual Name	LTC Benefit Status	LOC Status	LOC Start Date	Program Code
<a href="#">A, A</a>	Not Found	N/A	N/A	<a href="#">PACE</a>
<a href="#">ABRO, TEST</a>	Not Found	LOC MET	2022-02-01	<a href="#">PACE</a>
<a href="#">APCVOID, TEST</a>	Not Found	LOC MET	2022-04-01	<a href="#">PACE</a>
<a href="#">ARC, JOP</a>	Not Found	LOC Not Met	2022-02-01	<a href="#">PACE</a>
<a href="#">B, H</a>	Not Found	LOC Pending	2022-01-01	<a href="#">PACE</a>
<a href="#">BEF, HUNN</a>	Not Found	N/A	N/A	<a href="#">PACE</a>
<a href="#">BROWN, SAM</a>	Not Found	N/A	N/A	<a href="#">PACE</a>
<a href="#">CN, MVN</a>	Not Found	LOC MET	2022-07-01	<a href="#">PACE</a>
<a href="#">CN, MVN</a>	Not Found	N/A	N/A	<a href="#">PACE</a>
<a href="#">CONNOR, JOHN</a>	Not Found	LOC MET	2022-07-01	<a href="#">PACE</a>

1 2 3 4 5 6 7 8 9

# Quick Search Screen

The **Search Individual** screen is also referred to as the **Quick Search** screen. Providers can search for Individuals using multiple identifiers. Search results will be displayed on a table at the bottom of the **Search Individual** screen and only for Individuals associated with the PACE Organization.

Entering the minimum criteria is needed to search for an Individual. The more criteria entered, the narrower the results will be

**Please Note:** The minimum search criteria using the Quick Search function is *Identifier Type AND Identifier Value, OR First Name OR Last Name.*

# Individual Summary Screen

The **Individual Summary** screen is accessed by clicking on the **Individual's name** after using the *Quick Search* function to find them. PACE Providers have access to the **Individual Summary** screen and may take action on this screen.

The Individual's personal/contact information is displayed

Individual Summary

Individual Information

Individual Name	LYONS, JOSHUA	Last Action Date	04/01/2022
Date Of Birth	06/05/1966	SSN	400-58-5895
Gender	Male	Age	55
Primary Phone#	(859) 587-5852	Mailing Address	115 N BROADWAY PARK LEXINGTON KENTUCKY FAYETTE 40505-3505
Secondary Phone#	N/A		
Email Address	N/A		

Action

- View / Print Applications
- Assessment History
- View / Upload Documents
- View / Update Diagnosis
- Message Center
- View Tasks
- Request Level II
- Update Contact Details
- Request LOC Correction
- Approve LOC Correction
- Report Institutionalization

LTC Information

LTC Program	Application Status	LOC Status	Application Type	LOC Start Date	LOC End Date/Discharge Date	LOC Reassessment Date	Last Action Date	Specialized Services
<a href="#">PACE</a>	Saved	N/A	PACE	N/A	N/A	N/A	04/01/2022	N/A

LTC Correction Request Summary

No LOC correction requested

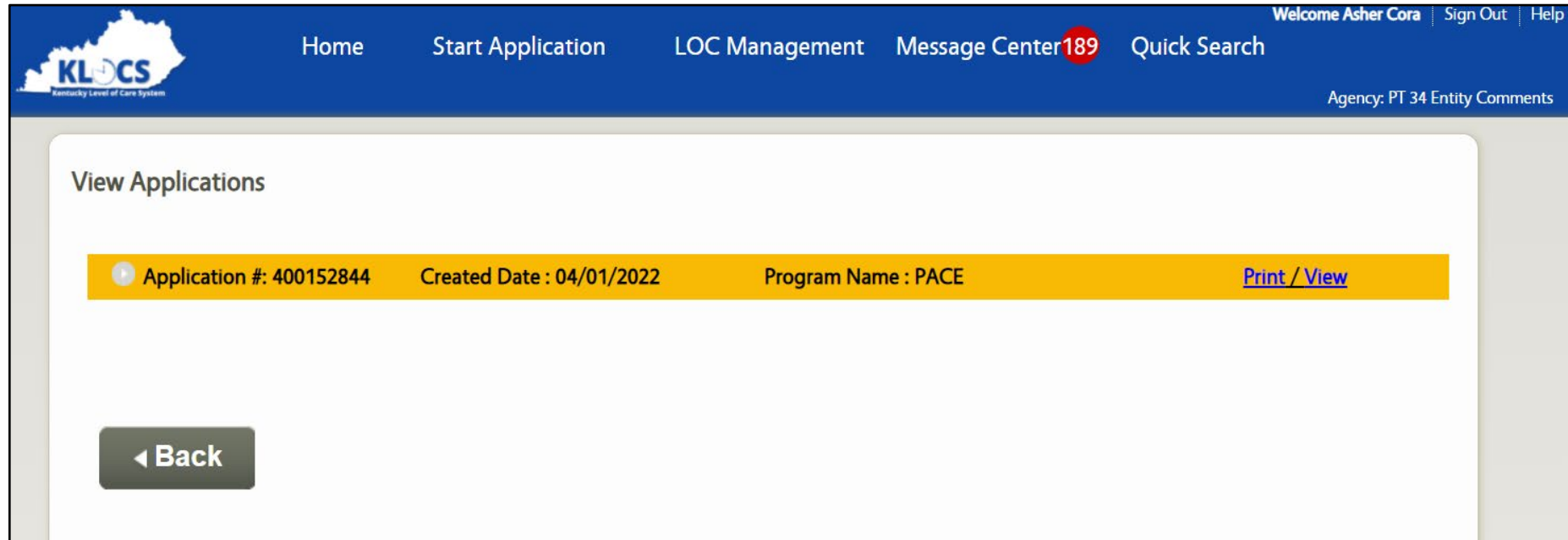
In the *Action* column, you may View/Print an application, view the Assessment History, View/Upload Documents and Diagnosis if needed, View Tasks on the Individual, Request an LOC Correction, and Report Institutionalization

The Individual's LTC Program and information is displayed

# View Applications Screen

The **View Applications** screen is accessible by clicking **View Applications** from the **Individual Summary** screen, this screen provides a detailed view of all applications associated with the Individual.

Click **Print/View** to view the Individual's application and print



View Applications

Application #: 400152844	Created Date : 04/01/2022	Program Name : PACE	<a href="#">Print / View</a>
--------------------------	---------------------------	---------------------	------------------------------

◀ Back

**Please Note:** While electronic notifications are immediate, the printable version of correspondences/applications is available the next day (after the nightly batch is processed).

# Message Center Screen

The **Message Center** screen is accessible by clicking **Message Center** from the **Individual Summary** screen. This screen provides access to all messages and copies of the correspondences sent to an Individual.

Click the **Message Subject** to open the message and view

The screenshot shows the KLOCS Message Center interface. At the top, there is a navigation bar with 'Home', 'Start Application', 'LOC Management', 'Message Center 189', and 'Quick Search'. The user is logged in as 'Asher Cora'. Below the navigation bar, the 'Message Center' section displays a table of messages. The table has three columns: 'Subject', 'From', and 'Date Received'. The messages listed are:

Subject	From	Date Received
<a href="#">LOC marked as MET for RIVERA,JOAN</a>	KLOCS Application	04/01/2022
<a href="#">PACE Application Intake for RIVERA, JOAN</a>	KLOCS Application	04/01/2022
<a href="#">LOC marked as Pended LOI for RIVERA,JOAN</a>	KLOCS Application	04/01/2022
<a href="#">PACE Application Intake for RIVERA, JOAN</a>	KLOCS Application	04/01/2022
<a href="#">LOC marked as MET for NEWEBR,GTRW</a>	KLOCS Application	04/01/2022
<a href="#">LOC marked as MET for IUFHG,RUHF</a>	KLOCS Application	04/01/2022
<a href="#">Partial Match Resolved for UWEB,DFRM</a>	KLOCS Application	04/01/2022
<a href="#">Member transitioned to IPACE for UWEB,DFRM</a>	KLOCS Application	04/01/2022
<a href="#">LOC marked as NOT MET for PANT,HAL</a>	KLOCS Application	04/01/2022
<a href="#">PACE Application Intake for PANT, HAL</a>	KLOCS Application	04/01/2022

At the bottom of the table, there is a pagination control showing '1' selected, followed by numbers 2 through 10, and a greater-than sign.

**Please Note:** The **Message Center** screen is also accessible from the **Dashboard** screen. If navigating to the **Message Center** screen using this method, it will show all notifications related to that Provider versus notifications specific to one Individual.



## WARNING

This website is the property of the Kentucky Health Benefit Exchange. This is to notify you that you are only authorized to use this site, or any information accessed through this site, for its intended purpose of assisting individuals, employers or employees in the selection or purchase of health plans or other benefits.

Unauthorized access or disclosure of personal and confidential information may be punishable by fines under state and federal law. Unauthorized access to this website or access in excess of your authorization may also be criminally punishable. The Commonwealth of Kentucky and the Kentucky Health Benefit Exchange follows applicable federal and state guidelines to protect the information from misuse or unauthorized access.

Reject

Accept

# Application Intake



## Items Needed to Submit Application



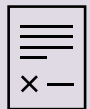
Member Name, Date of Birth, and Social Security Card



Member's Diagnosis



Any Medical Information

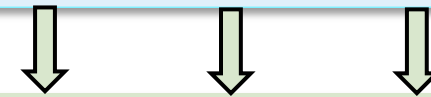


Signed Documentation

- User Agreement
- Assessment Document

## Submit Application

- Once the Provider has gathered all information needed, you may begin the LOC Application for the member.
- You will go through all screens of the PACE Application, answering all required questions.
- For non-required portions of the application, fill out as much as possible on the member. The information provided will determine the LOC Application Status.
- Upload all required documentation for the member application.



## Receive LOC Status

Once submitted, the application will receive a status of LOC Met, LOC Not Met, or LOC Pended – LOI.




[Home](#)
[Start Application](#)
[LOC Management](#)
[Message Center 150](#)
[Quick Search](#)

 Welcome Oscar Penelope | [Sign Out](#) | [Help](#)

Agency: PT 19 Entity Comments

## Dashboard

Time Travel Date: 04/22/2022

[Change Time Travel Date](#)

### Quick Links

[Start New Application](#)
[Message Center 150](#)
[View Announcements 1](#)
[Quick Search](#)

### LOC Management

[Manage Discharge](#)

### Other Links

[Member View](#)
[FAQ](#)
[MAP Forms](#)
[Policy Documents](#)
[CHFS Website](#)
[Page Help](#)

### Unread Announcements – Click 'View Announcements' under Quick Links.

	My Tasks	Group Tasks
Tasks Assigned	0	7
Due	0	0

Task Type	My Tasks	Group Tasks
PACE Lack of Information	0	1
PACE Semi-Annual Assessment	0	6

### Tasks

[Search Tasks](#)

 Select Queue: 

 Filter Columns: 


Task Name	App #	Action	Provider #	Individual Name	Program
No tasks available for this queue					

# Application Management



## LOC Met

- PACE PRO determines that the LOC is Met
- PACE LOC is marked as Met
- PACE Enrollment Start Date is the first of the next month

## LOC Not Met

- PACE PRO determines that the Member does not meet Commonwealth's Nursing Facility Level of Care
- A correspondence is sent to the Individual with appeal rights and an electronic notification is also sent to the associated PACE Provider

## LOC Pended – LOI

- Application is missing information, task triggered by PACE PRO
- PACE Provider must update the application and resubmit within 14 business days
- A review task is generated for the PACE PRO

- 1
- The PACE Provider submits an application for Joe on 4/4/2022 with an anticipated admission of May 2022.
  - The LOC Review is completed on 4/21/2022, so Joe's **PACE services are effective 5/1/2022.**

- 2
- The PACE Provider submits an application for Joe on 4/4/2022 with an anticipated admission of May 2022.
  - The LOC Review is completed on 5/21/2022, so Joe's **PACE services are effective 6/1/2022.**

- 3
- The PACE Provider submits an application for Joe on 5/4/2022 with an anticipated admission of July 2022.
  - The LOC Review is completed on 5/21/2022, so Joe's **PACE services are effective 7/1/2022.**

- 4
- The PACE Provider submits an application for Joe on 6/4/2022 with an anticipated admission of August 2022.
  - It is determined that Joe is 54 years and 9 months, so Joe's **PACE services are not effective until he is 55.**

## Application Status Descriptions

- **Saved:** Indicates a PACE Provider has saved an application
- **Complete:** Indicates that the PACE PRO has completed application review/evaluation and determined that LOC is Met or Not Met
- **PACE PRO Review:** Indicates that the application has been submitted and has been sent to the PACE PRO for review
- **DMS Partial Match:** Indicates that the system cannot identify the member and a task is sent to DMS to resolve the Partial Match
- **Pended - LOI:** Indicates that the PACE Provider/Facility has completed the application, but the reviewer needs more information
- **Closed:** Indicates the application has been closed by a batch as the LOI is not completed and returned
- **Discharged:** Indicates that the member has been discharged from and by the PACE Provider/Facility
- **Systematically Discharged:** Indicates that the Individual has been systematically discharged
- **Transferred:** Indicates that the Individual has been transferred by the PACE facility to another facility
- **Cancelled:** Indicates that the Facility cancelled the approved LOC as member was never admitted to their facility

## Application Outcomes

- ✓ There are three application outcomes: LOC Met, LOC Not Met, and LOC Pended – LOI.
- ✓ If the application is LOC Pended – LOI, please review and submit any information needed within 14 days.

## Start Date

- ✓ The start date for PACE Services begins on the first day of the following month once services have been approved by the PACE PRO.

**This concludes Part 1 of PACE Provider Training. Part 2 will be held on July 26**



# Program of All-Inclusive Care For The Elderly (PACE)

## KLOCS Webinar for PACE Providers

July 2022  
Part 2





TOPIC	DESCRIPTIONS
<b>Provider Tasks</b>	<ul style="list-style-type: none"><li>• LOI Task</li><li>• Semi-Annual Assessment</li><li>• Reassessment Reminder</li><li>• LOC Overlap</li><li>• Age Requirement Failure</li></ul>
<b>Long-Term Care Facility</b>	<ul style="list-style-type: none"><li>• Overview of PACE and Long-Term Care Facilities</li></ul>
<b>Ongoing Management</b>	<ul style="list-style-type: none"><li>• Overview of Discharges and Transfers</li></ul>
<b>Do This, Not That</b>	<ul style="list-style-type: none"><li>• Overview of scenarios within KLOCS and PACE</li></ul>

# Provider Tasks





## What is This?



## Why did I get this Task?



## How do I complete this Task?



Uh oh.

### What is a PACE LOI Task?

- A Lack of Information (LOI) Task occurs when the PACE PRO reviews the PACE application or reassessment and does not have enough information necessary to make an LOC Determination.
- Reasons this can happen may include: a document was uploaded without a signature, the wrong type of document was uploaded, etc.

### What triggers this task?

- During their review, the PACE PRO is prompted to confirm if all information was provided by the PACE Provider to make an LOC Determination. The PACE PRO selects **No** and is prompted to leave a comment explaining what information is missing. Once they click submit, the LOI Task is generated for the PACE Provider to resolve.

### As the PACE Provider what do I need to do to resolve the task?

- Regularly log into KLOCS and check if your organization has new tasks assigned by selecting **Group Tasks** from the *Select Queue* filter in the *Tasks* section on the **Dashboard** screen. The default view is **My Tasks** which displays tasks the user previously started.
- Review the comment left by the PACE PRO to verify what information they need. Provide the correct information and click **Submit** to close the task. This triggers a new review task for the PACE PRO.

### Watch Out!

- If the Task is not completed within 14 business days, the system will close the application. The application cannot be re-opened and the Provider will have to submit a new application.
- Please complete the task (i.e., Click **Submit**). Occasionally, Providers upload documents through the **Individual Summary** screen but don't complete the LOI Task. Not completing the task results in the system closing the application!
- The PACE Provider is responsible for providing the correct information needed within 14 business days. If additional LOI Tasks are generated the clock does not reset with each exchange.



## Dashboard

Time Travel Date: 04/11/2022

[Change Time Travel Date](#)

### Quick Links

[Start New Application](#)[Message Center](#) 142[View Announcements](#) 1[Quick Search](#)

### LOC Management

[Manage Discharge](#)

### Other Links

[Member View](#)[FAQ](#)[MAP Forms](#)[Policy Documents](#)[CHFS Website](#)[Page Help](#)

### Unread Announcements – Click 'View Announcements' under Quick Links.

	My Tasks	Group Tasks
Tasks Assigned	0	8
Due	0	0

Task Type	My Tasks	Group Tasks
PACE Lack of Information	1	1
PACE Semi-Annual Assessment	0	6

### Tasks

[Search Tasks](#)Select Queue: Filter Columns: 

Task Name	App #	Action	Provider #	Individual Name	Progra
-----------	-------	--------	------------	-----------------	--------

No tasks available for this queue



## What is This?



## Why did I get this Task?



## How do I complete this Task?



Uh oh.

### What is the PACE Semi-Annual Assessment Task?

- This task notifies the PACE Provider to review the information on the application to ensure the most up-to-date information is uploaded in KLOCS.

### What triggers this task?

- The system triggers this task six months from the LOC Start Date or last Reassessment Date.

### As the PACE Provider what do I need to do to resolve the task?

- Regularly log into KLOCS and check if your organization has new tasks assigned by selecting **Group Tasks** from the *Select Queue* filter in the *Tasks* section on the **Dashboard** screen. The default view is **My Tasks** which displays tasks the user previously started.
- Review the application to confirm that the information listed is still up-to-date.

### Watch Out!

- Don't worry: Semi-Annual Assessment Tasks do not have a due date and the LOC is not auto closed.



## What is This?

### What is the Reassessment Reminder Task?

- This task notifies the PACE Provider to complete an annual assessment on the PACE Participant.



## Why did I get this Task?

### What triggers this task?

- This task is triggered 40 business days prior to the reassessment due date.



## How do I complete this Task?

### As the PACE Provider what do I need to do to resolve the task?

- Regularly log into KLOCS and check if your organization has new tasks assigned by selecting **Group Tasks** from the *Select Queue* filter in the *Tasks* section on the **Dashboard** screen. The default view is **My Tasks** which displays tasks the user previously started.
- Review the application to confirm that the information listed is still up-to-date. The PACE Provider must update the diagnosis(es) as needed and upload any required documentation.
- This triggers a task for the PACE PRO to review the latest information and verify the LOC Determination is still MET.



Uh oh.

### Watch Out!

- If the Task is not completed by the due date, the system will discharge the LOC. It cannot be re-opened and the Provider will have to submit a new application.
- Please complete the task (i.e., Click **Submit**). Occasionally, Providers upload documents through the **Individual Summary** screen but don't complete the Task. Not completing the task results in the system discharging the LOC.



## What is This?



## Why did I get this Task?



## How do I complete this Task?



Uh oh.

### What is the Existing LOC Overlap Task?

- This task is triggered when DMS resolves a Partial Match Task and the system determines that the Individual applying for PACE already has an active LOC with another Provider OR they have an application under review.
- This task is assigned to the PACE Provider that submitted the new application.

### What triggers this task?

- When a PACE Provider fills out an application, if the demographic information matches an Individual with an active LOC an error message displays and application intake is paused until that active LOC is closed by the other Provider.
- HOWEVER if the system cannot determine if the PACE application is for an Individual already in IEES, then the PACE Provider will be able to submit the application and a Partial Match Task is triggered for DMS to review.
- When DMS resolves that task, if it turns out the Individual already has an active LOC with another Provider OR has an application under review, then the Existing LOC Overlap Task is triggered.

### As the PACE Provider what do I need to do to resolve the task?

- Regularly log into KLOCS and check if your organization has new tasks assigned by selecting **Group Tasks** from the *Select Queue* filter in the *Tasks* section on the **Dashboard** screen. The default view is **My Tasks** which displays tasks the user previously started.
- The PACE Provider must contact the Provider with the active LOC. This could be another PACE organization or a Nursing Facility.
- There is no due date for this task to be completed.

### Watch Out!

- If the PACE Provider submits an application and the system says there is a Partial Match, the PACE Provider should immediately double check if the demographic information entered is correct.
- If the submitted application contains incorrect information, it cannot be edited. The PACE Provider should **Withdraw** the application via the *Applications* section on the **Dashboard** screen and submit a new one.



## What is This?



## Why did I get this Task?



## How do I complete this Task?



Uh oh.

## What is the Age Requirement Failure Task?

- This task is triggered when DMS resolves a Partial Match Task and the system determines that the Individual doesn't meet the PACE Age Requirement.

## What triggers this task?

- The earliest an application can be submitted is when the Individual is 54 years and 9 months old. During application intake if the Date of Birth (DOB) entered is earlier than that, then an error message will display that the Individual doesn't meet the age requirement.
- HOWEVER if the incorrect birthdate is entered then the PACE Provider may be able to submit the application and a Partial Match Task is triggered for DMS to review.
- When DMS resolves that task, if it turns out the Individual isn't at least 54 years and 9 months old, then the Age Requirement Failure Task is triggered.

## As the PACE Provider what do I need to do to resolve the task?

- Regularly log into KLOCS and check if your organization has new tasks assigned by selecting **Group Tasks** from the *Select Queue* filter in the *Tasks* section on the **Dashboard** screen. The default view is **My Tasks** which displays tasks the user previously started.
- The task itself is for the PACE Provider to review the **Basic Information** screen (read-only). Click **Next** to close the task.
- The outcome is that the Application changes from *DMS Partial Match* to *Saved*.

## Watch Out!

- If the PACE Provider submits an application and the system says there is a Partial Match, the PACE Provider should immediately double check if the demographic information entered is correct.
- If the submitted application contains incorrect information, it cannot be edited. The PACE Provider should **Withdraw** the application via the *Applications* section on the **Dashboard** screen and submit a new one.



## Tasks Available

- ✓ PACE Providers have five tasks that may need to be completed: PACE LOI, Semi-Annual Assessment, Reassessment Reminder, Existing LOC Overlap, and Age Requirement Tasks.
- ✓ The PACE LOI Task must be completed within 14 days for the application to be processed and reviewed.

# Long-Term Care Facilities



## What happens if a PACE Participant enters a Long Term Care Facility?

- If a PACE Participant enters a long term care facility, as long as they reside in the nursing facility and remain enrolled in PACE, the PACE Provider will continue to pay for all their care.
- HOWEVER under Medicaid regulation when a Medicaid Member enters a nursing facility, the Medicaid Member may be responsible for paying a portion of their health care costs.
- The amount that a Medicaid Member must pay for long term care services is called Patient Liability.

## What do I do in KLOCS?

1

Click **Quick Search** and search for the Individual. Click the **Individual Name** hyperlink to navigate to the Participant's **Individual Summary** screen.

2

On the Individual Summary screen, click the **Report Institutionalization** button.

3

On the **Report Institutionalization** screen, enter the required fields including the Nursing Facility Admission Date and the Facility Information. Click **Add**.

4

Review the information entered. If correct, click **Submit**.

## Why is Reporting Institutionalization Important?

### Nursing Facilities

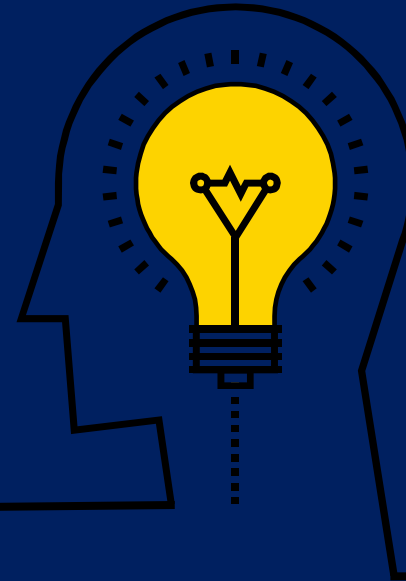
- Facilities are federally required to complete a Preadmission Screening and Resident Review (PASRR) on the PACE Participant entering their facility. For Medicaid Members, this PASRR task is completed in KLOCS.
- **The Nursing Facility is dependent on the PACE Provider to report institutionalization which triggers a PASRR Task to be completed by the Nursing Facility.**
- Since the PACE LOC remains active, the nursing facility cannot submit an LOC application.

### Department for Community Based Services (DCBS)

- When the PACE Provider reports institutionalization, it **triggers a task for a DCBS case worker to determine the Patient Liability amount.**
- Likewise, when a PACE Provider discharges the PACE Participant from the nursing facility in KLOCS, that action triggers another task for the DCBS case worker to re-run eligibility as the PACE Participant has returned to the community and Patient Liability is no longer owed.

**Please Note:** Best practice is to report institutionalization the same day the PACE Participant enters the facility. Alternatively, the PACE Provider can report up to 3 days in the future or up to 3 days previous.

# Ongoing Management



## TRANSFER

- The PACE Provider should select **Transfer** when the LOC is being “handed off” to another PACE organization or a nursing facility (if it was previously reported the PACE Participant is currently in a nursing facility).
- If a PACE Participant is currently receiving care in a nursing facility (i.e., previously reported by the PACE Provider), in this instance the PACE Provider has the ability to transfer the LOC from the PACE Provider to the nursing facility.

## DISCHARGE

- If level of care services are not being “handed off” to another Provider, then select either **Voluntary Discharge** or **Involuntary Discharge**.
- If a discharge was entered in error or needs to be cancelled, as long as the application has not been systematically closed the PACE Providers have the ability to cancel the discharge request.
- If the application has been systematically closed, the PACE Provider cannot re-open the application. The PACE Provider will need to enter a new application.

## ADMISSION CANCELLATION

- **Admission Cancellation** is when the Individual applies for PACE and is approved, but prior to their service start date decides they no longer want to participate in the program OR are admitted to a long term care facility.
- Occasionally, after an LOC has been determined Met the Provider may discover that the SSN entered is incorrect. In that instance, they’ll have to cancel the LOC and submit a new application. The Provider will have to request from DMS a special circumstance for the LOC start date to be updated.

**Please Note:** It is critical LOCs are kept up to date by all Providers to ensure that services to the Medicaid Member are not disrupted and that payments are issued to the appropriate facilities in a timely manner.

# PACE Discharges Types in KLOCS



Discharge Type	Discharge Reason
Involuntary Discharge	Failure to pay or make arrangements to pay spend down after 30-day grace period
	Participant engages in disruptive or threatening behavior
	Participant moved out of PACE Program service area
	Participant no longer meets NF LOC
	PACE Program agreement not renewed or is terminated
Voluntary Discharge	Death
	Member choice
Admission Cancellation	Member never admitted
Transfer	Another PACE Provider
Transfer – If it was reported that a PACE Participant was admitted to a nursing facility, the following <i>Discharge Reasons</i> will display if Transfer is selected for that Participant	PACE Revoked and admitting to Nursing Facility
	PACE Revoked and admitting to new Nursing Facility
	Discharge from Nursing Facility
	Another PACE Provider and admitting to new Nursing Facility

The screenshot shows the KLOCS dashboard interface. At the top, there is a navigation bar with the KLOCS logo, 'Home', 'Start Application', 'LOC Management', 'Message Center' (with a red notification badge '125'), and 'Quick Search'. On the right side of the navigation bar, it says 'Welcome Jack Amelia | Sign Out | Help' and 'Agency: PT 19 NE Entity'. Below the navigation bar, there is a 'Dashboard' header. A grey bar displays 'Time Travel Date: 04/10/2022' and a link to 'Change Time Travel Date'. A 'Quick Links' sidebar on the left contains links for 'Start New Application', 'Message Center' (125), 'View Announcements' (28), 'Quick Search', 'LOC Management', 'Manage Discharge' (highlighted with a red box), 'View Reports', and 'Other Links'. A red banner contains the text: 'Unread Announcements - Click 'View Announcements' under Quick Links. As per KLOCS data records the Medicaid enrollment period for the provider you have logged in is currently past due. You are not supposed to start a new application unless the provider is in process or planning to continue participating as a KY Medicaid provider.' Below the banner are two tables. The first table shows task counts for 'My Tasks' and 'Group Tasks' across 'Tasks Assigned' and 'Due' categories. The second table shows task counts for 'My Tasks' and 'Group Tasks' for the 'Approve Transfer' task type.

1. Click **Manage Discharge**

	My Tasks	Group Tasks
Tasks Assigned	3	0
Due	0	0

Task Type	My Tasks	Group Tasks
Approve Transfer	3	0

# Entering A Discharge

**Manage Discharge**

Search By Individual

First Name

Identifier Type

Last Name

Identifier

2. Enter **First Name**

4. Select **Identifier Type** if needed

3. Enter **Last Name**

5. Enter **Identifier** if needed

6. Click **Search**



### Manage Discharge

▼ Search By Individual

First Name  Last Name

Identifier Type  Identifier

[← Back](#) [Reset](#) [Search](#)

<u>Individual Name</u>	<u>Date of Birth</u>	<u>Individual ID</u>	<u>LTC Program</u>	<u>LOC Start Date</u>	<u>Action</u>
BOONE, SOPHIE	01/25/1961	970020687	PACE	05/01/2022	<a href="#">Request Discharge</a>

7. Click **Request Discharge**

# Entering A Discharge

**Submit Discharge** \* = Required field

**Individual Information**

Individual Name	Date of Birth	Individual Id	LTC Program	LOC Start Date
BOONE, SOPHIE	01/25/1961	970020687	PACE	05/01/2022

**Discharge Information**

Discharging Facility Name : PT 19 NE Entity      Discharging Provider Id : 7100770260

\* Discharge Type

\* Discharge Reason

\* Discharge Date

\* Discharge Time

\* Discharge Time Zone

Effective Discharge Date :

8. Select the **Discharge Type**

9. Select or enter the **Discharge Date**

10. Select the **Discharge Reason**

12. Select the **Discharge Time Zone**

13. Enter the **Discharge Time**

14. Select **AM** or **PM**

**Transferring To**

Provider Name		Provider Location	
<input type="text"/>	<b>LOOK UP</b>	<input type="text"/>	
* Discharge Comments		<input type="text"/>	

15. Select **Look Up**

**Nursing Facility Provider Search** ⓧ

Provider Number	<input type="text"/>	County	--Select-- <span>▼</span>
-----------------	----------------------	--------	---------------------------

**Search**

16. Enter the **Provider Number**

17. Select the **Provider County**

18. Click **Search**

Nursing Facility Provider Search ⓧ

Provider Number  County

	Provider Number	Provider Name	Enrollment Start Date	Enrollment End Date	Address	County
<input type="radio"/>	7100770300	PT 34 Entity Comments	11/07/2001	01/30/2016	930 BYPASS ROAD 930 BYPASS ROAD, PIKEVILLE	FAYETTE

19. Select the **Provider**

20. Click **Select**

21. Enter **Discharge Comments**

Transferring To

Provider Name: PT 34 Entity Comment:  Provider Location: 930 BYPASS ROAD930

\* Discharge Comments:  7996 of 8000 characters remaining

Document Summary

Document Type	Date	Comments	Action
---------------	------	----------	--------

Document Upload Section

Document Type:  File:    
Supported file Types: \*.PDF, \*.TIFF and \*.TIF only Maximum File size must not exceed 5 MB

Comments:    
[Attach Another Document](#)

Note : Do not submit a discharge for an individual who is in a bed hold situation.

22. Attach **Documents** as needed

23. Click **Submit Request**

## Confirm Discharge Request

By clicking "Submit" you are discharging the Individual. Are you sure you want to discharge?

24. Click **Yes**

Yes

No

# Discharge and Transfer Demonstration



Welcome Oscar Penelope | Sign Out | Help

Home Start Application LOC Management Message Center **150** Quick Search

Agency: PT 19 Entity Comments

### Dashboard

Time Travel Date: 11/05/2022 [Change Time Travel Date](#)

#### Quick Links

- [Start New Application](#)
- [Message Center \*\*150\*\*](#)
- [View Announcements \*\*1\*\*](#)
- [Quick Search](#)

#### LOC Management

- [Manage Discharge](#)

#### Other Links

- [Member View](#)
- [FAQ](#)
- [MAP Forms](#)
- [Policy Documents](#)
- [CHES Website](#)
- [Page Help](#)

#### Unread Announcements – Click 'View Announcements' under Quick Links.

	My Tasks	Group Tasks
Tasks Assigned	0	7
Due	0	0

Task Type	My Tasks	Group Tasks
PACE Lack of Information	0	1
PACE Semi-Annual Assessment	0	6

#### Tasks [Search Tasks](#)

Select Queue:  Filter Columns:

Task Name	App #	Action	Provider #	Individual Name	Progra
No tasks available for this queue					



# Cancelling A Discharge

If a PACE Participant's discharge needs to be cancelled, you as the Provider may cancel the request to discharge, as long as the application has not yet been systematically discharged. Navigate to the **Submit Discharge** screen to cancel the request.

From the **Submit Discharge** screen, select **Cancel Request** from the bottom of the screen

The screenshot shows the 'Submit Discharge' form with the following sections:

- Individual Information:** A table with columns: Individual Name (ROGAN, JOSEPH), Date of Birth (01/01/1980), Individual Id (970017061), LTC Program (PACE), and LOC Start Date (10/01/2021).
- Discharge Information:** Includes fields for Discharging Facility Name (PACE Provider 1), Discharging Provider Id (123456789), Discharge Type (dropdown), Discharge Reason (dropdown), Discharge Date, Discharge Time, and Discharge Time Zone.
- Transferring To:** Includes fields for Provider Name (with a 'LOOK UP' button) and Provider Location.
- Discharge Comments:** A text input field.
- Document Summary:** A table with columns: Document Type, Date, Comments, and Action.
- Document Upload Section:** Includes a Document Type dropdown, a File input with a 'Browse' button, and a note: 'Supported file Types: \*.PDF, \*.TIFF and \*.TIF only Maximum File size must not exceed 5 MB'.
- Comments:** A text input field with an 'Attach' button and a link 'Attach Another Document'.
- Navigation:** At the bottom, there are three buttons: 'Back', 'Cancel Request' (highlighted with a red box), and 'Submit Request'.

1

Joan is currently a PACE Participant with the program in Lexington. Her family has decided that it would be best to move her closer to their home in Bowling Green. Joan would still like to remain in a PACE Program when she moves if possible.



2

Bowling Green is in a county in Kentucky that does provide PACE services; however, the PACE Provider in Bowling Green is a different Provider than the one in Lexington. The current PACE Provider will need to complete a **transfer** for Joan to the new PACE Provider. They should select 'Another PACE Provider' when submitting the request.

1

Edward is a PACE Participant but his physical care has been declining. After speaking with his family and healthcare providers, Edward thinks it may be best to enter a Nursing Facility for more hands-on care.



2

The PACE Provider will need to submit a **discharge** for Edward since he will be entering a Nursing Facility. In this instance, this is a **voluntary discharge** as it is 'Member choice.'

**Please Note:** Had Edward made this decision after entering the nursing facility (i.e., he entered as a PACE Participant), the PACE Provider could initiate a **transfer** as Edward is revoking PACE and choosing to remain in the facility (i.e., discharge reason would be 'PACE Revoked and admitting to Nursing Facility').

1

Campbell is a PACE Participant but is currently in a Nursing Facility due to a fall. Campbell has opted to stay in the Nursing Facility after recovery, as he no longer feels that he will be able to live in his home alone without more direct care.



2

Since Campbell is already in a Nursing Facility, the PACE Provider may enter a **transfer** for Campbell to the Nursing Facility. They should select discharge reason 'PACE Revoked and admitting to Nursing Facility' when submitting the request.

## Transfers

- ✓ Transfers are completed for the PACE Participant when they are transferring to another PACE Facility or if the PACE Participant is in a Nursing Facility and is choosing to remain in the facility.

## Discharges

- ✓ There are Voluntary Discharges and Involuntary Discharges that may be submitted on behalf of the PACE Participant.

## Cancelling A Discharge

- ✓ In the event that a Provider needs to cancel a discharge, this can be completed from the **Submit Discharge** screen.

# Do This, Not That



## Scenario...

When a PACE Provider submits an application for a Medicaid Member or someone pending Medicaid Eligibility, it is important to accurately enter all identifying information on the Individual, especially the Social Security Number.

If the SSN or demographic information (e.g., birthday, first and last name) doesn't match the information on the Medicaid case, then then the LOC may not get linked to that case!

Verify the SSN entered on the **LOC Application - Basic Information** screen is accurate based off of the documentation provided by the PACE Participant.

After submitting an application if the system says a Partial Match was found, double check the information is accurate. If an error is found, withdraw the application and submit a new application.

## ...What to do

## Scenario...

When a PACE Provider has a task available to complete, they must make sure to go through the steps and accurately complete the task.

The PACE Provider will need to select **Start** or **Continue** from the *Tasks* section on the **Dashboard** screen and complete the task by going through the various screens and updating as needed.

All documentation should be added when completing the task and **not** on the **Individual Summary** screen.

## ...What to do



## Scenario...

A PACE Participant intends to remain in the PACE program but is leaving the community to receive services in a long term care facility.

The PACE Provider is responsible for reporting a PACE Participant's nursing facility admission date in KLOCS on the Report Institutionalization screen.

...What to do

## Scenario...

A PACE Participant previously reported as being in a nursing facility is returning to the community to receive services.

The PACE Provider is responsible for reporting the nursing facility discharge in KLOCS. On the **Submit Discharge** screen, select **Transfer** for the *Discharge Type*, and for the *Discharge Reason* select **Discharge from Nursing Facility**.

Be careful not to discharge them from PACE!

## ...What to do

## Scenario...

The PACE Provider submits an application in KLOCS on 1/15, PACE PRO approves on 1/20 (effective 2/1), but the PACE Participant needs to go into a nursing facility on 1/20.

While PACE services don't begin until 2/1, the PACE LOC is active. The nursing facility cannot enter an LOC application because there's already an active LOC.

The PACE Provider needs to do an "admission cancellation" through the **Submit Discharge** screen in KLOCS. This will allow the nursing facility to submit an LOC.

Once the PACE Participant is out of the nursing facility (and the facility submit a discharge in KLOCS), the PACE Provider will have to enter another PACE application for that Participant.

## ...What to do

## Resources Available to Providers



**Have Onboarding Questions?** Email [KLOCSOrgAdmin@ky.gov](mailto:KLOCSOrgAdmin@ky.gov)



**Where Are Materials to Review?** The user guide, a copy of this presentation, and the recordings will be shared with the Providers.



**Need to Report a KOG/KLOCS Issue?** Call 855-326-4650 - Select Option 2 (Providers) then Option 4 (KLOCS Technical Support) or email [Medicaidpartnerportal.info@ky.gov](mailto:Medicaidpartnerportal.info@ky.gov)

**Thank you for participating in  
the PACE Training!**