

Tracking Short-Term Reviews in Aging & Disability (A&D)

Revision History

Release Date	Version	Description	Author
August 23, 2023	1.0	Initial publication	EOEA Home Care

Background

This Business Rule relates to the Executive Office of Elder Affairs (EOEA) Program Instruction 22-07 *Clinical Assessment and Eligibility for Nursing Facility Assessments*.

ASAP Registered Nurses (RN) conduct clinical eligibility determinations for authorization of MassHealth payment of nursing facility (NF) services for MassHealth members seeking admission to a nursing facility from the community, and for members/ applicants admitted to a nursing facility under a payor source other than MassHealth, converting to MassHealth payment.

Per Program Instruction 22-07: *Clinical Assessment and Eligibility for Nursing Facility Assessments*, the ASAP must work with the NF to ensure timely completion of the Short-Term Review (STR). ASAPs are required to:

- track all Short-Term Reviews (STR),
- conduct all necessary subsequent reviews before the expiration of the Short-Term Approval (STA) date, and
- to utilize the Activity & Referral (A&R) functionality within Aging & Disability (A&D) as defined in this business rule.

Tracking STRs using an A&R provides ASAPs the ability to generate reports that assist with:

- Identification of all open STRs & due dates
- Managing workloads
- Scheduling NF visits
- Timely completion of clinical screens
- Ensuring staff are aware of consumers needing a STR screening as required

Best practice is to have staff practicing at the top of their training or licensure; nurses are not required by EOEA to data enter A&Rs, leveraging administrative staff is a recommended practice.

Creating & Completing an A&R for tracking STRs

Once the CDS-2-NF is completed and saved, then the A&R for a STR must be created in A&D. The A&R's purpose serves as a tracking system reminder of the next STR, due prior to the expiration of the previous STA.

Activity & Referral

CAE Short Term Review is the Action Type utilized to record the STR and document the status of the follow-up for the STR.

- **Status date** is the current date
- **Due date** is the expiration date of the STA as documented in the CDS
- **Date completed** is the date that the ASAP RN completes the STR.

See chart below for details

Activity/Referral - CAE Short Term Review X

Activity/Referral - CAE Short Term Review

Save | Save and Close | Close | Add Next | Make a Copy | Print | Open Audits | Format Panels |

Subject

Action CAE Short Term Review

Agency CAE Non-Acute Hospital Screen

Provider CAE PACE Screening

Subprovider CAE Reassessment

Care Program CAE Referral

Site CAE Retroactive Screening

Status CAE Short Term Review

Reason CAE Transfer Screening

Status Date 8/10/2023

Due Date Enter date

Comments

A&R Data Fields in A&D

Element	Values	Notes
Action	CAE Short Term Review	Required Select dropdown element. This field can be a report criteria.
Subject	Brief Headline Example: <ul style="list-style-type: none"> STR at [name of nursing facility] 	Required Entered by user. Make a clear headline to appear on reports. Suggested: refer to the name of the NF.
Agency	Select your agency	Required
Provider		Optional Use this element to assign to a particular user, if desired. If the A&R is assigned to a particular user, then the A&R can be displayed on the user's or the supervisor's dashboard. This element can also be a criteria used in Activity Reports, e.g. "Show me all the A&R's of type X assigned to provider Y."
Program		Optional Some agencies may wish to use this element, setting it to CAE. Can be used to filter the agency-wide A&R list, and in reports.

Element	Values	Notes
Status	<ul style="list-style-type: none"> • Not Started • Completed • In Progress • Withdrawn 	<p>Required</p> <p>Default is Not Started. EOEA requires change of status when A&R is Completed or Withdrawn.</p> <p>Set status = Completed only after the scheduled assessment has taken place and a clinical determination has been made</p> <p>Set status= Withdrawn if consumer has expired, at consumer request, or if the consumer has been discharged.</p> <p>In Progress is optional. Enter according to agency business practice.</p> <p>Do not use other Statuses.</p>
Status Reasons	<p>If Completed select:</p> <ul style="list-style-type: none"> • Short Term Approval • Long Term Approval • Completed but Denied <p>If Withdrawn select:</p> <ul style="list-style-type: none"> • Client Expired • Client Request • Nursing Facility Discharge 	<p>Required when status is Completed or Withdrawn.</p> <p>Not Required when the status is Not Started or In Progress.</p> <p>An A&R shall never be deleted.</p>
Status Date	Today's date	Required

Element	Values	Notes
		Automatically applied.
Due Date	In CDS, date indicated for Q5541 "Date for Nursing Facility Short-Term Approval"	Required This must align with the CDS date. This date can be specified in Activity Reports.
Date Completed	If status reason is Completed , then in CDS, date indicated for Q7854 "Date of Clinical Determination" If status reason is Withdrawn , then the date completed is the date the screen has been withdrawn.	Required when status is Completed or Withdrawn This is not the date of data entry for the A&R.
Comments		Optional These notes can be displayed on Activity/Referral reports. Complete per ASAP business practice.

NF transfer A&R Requirements

If the ASAP learns that a consumer will transfer to another NF the following must occur:

- Withdraw the current A&R
 - Status Reason: Nursing Facility Discharge
- If a transfer is within the ASAPs catchment area a new A&R must be created to capture the new STR.
- If a transfer is outside of the ASAPs catchment area the transferring ASAP must notify the receiving ASAP of the transfer per agency business practice.

STR Reporting

ASAPS are required to run a STR tracking report that meets the requirements of this Business Rule, a minimum of monthly, review for accuracy and outstanding STR's that are due, review the current status of the STR and complete any necessary follow up to ensure timely completion of short-term reviews.

The ASAP is responsible for

- generating reports,
- reviewing for quality assurance,
- correcting inaccurate data
- identifying inaccuracy trends,
- addressing inaccuracies, and
- completing necessary follow-up within a timely manner.

All follow up actions completed by the ASAP must be documented in the consumer's A&D record as appropriate.

The *Short-Term Review Tracking* Report is available in HAR. See user guide for additional details.

This Business Rule is effective as of October 1, 2023.

If you have questions regarding this Business Rule, please contact: Melissa Enos, Home Care and Program Analytics Nurse at Melissa.A.Enos@mass.gov

If you have questions regarding the Short-Term Review Tracking Report, please contact: Nick Roberts, Home Care Data Analyst at Nicholas.P.Roberts@mass.gov