AGE Home Care

Revision History

Date	Version	Description	Author
March 10, 2025	1.0	Initial publication	AGE Home Care Team

Enhanced Community Options Program Pending Tracking Overview

The Executive Office of Aging & Independence (AGE) operates and regulates the State Home Care program pursuant to MGL Chapter 19A and 651 CMR 3.00. The Home Care program services, support consumers living in the community. The Enhanced Community Options Program (ECOP) was implemented to provide a higher level of services in the community to older adults who are ineligible for MassHealth Standard and meet the clinical requirements for nursing facility services. The goal of the program is to provide enhanced service plans for consumers to live safely and independently within the community setting of their choosing.

Each Aging Services Access Point (ASAP) has a maximum enrollment allowance for it's ECOP program. The implementation of a maximum enrollment allowance is intended to ensure the long-term stability of the Home Care Program and services for Home Care consumers.

The ECOP Pending Care Enrollment is available within Aging & Disability (A&D) and shall be utilized for tracking, data reporting, and program health purposes. This business rule establishes requirements for how to record enrollment and consumer data within A&D.

Consumers are entered into an ECOP pending status until such time as an ECOP enrollment slot is available for their enrollment. Consumers are not screened for clinical eligibility for ECOP until there is an available slot for them to enroll.

A&D Documentation in Consumer Record:
Requirements

- **Care Enrollment**: **ECOP Pending** is the care enrollment utilized to document and track the **process and outcome** of a consumer who appears eligible for ECOP but has not been clinically determined as there is not an ECOP slot available. The **ECOP Pending** enrollment consists of the following data elements:

o **Status:** current status of the enrollment (detailed further in Business Rule)

o **Reason:** why the enrollment is in the status chosen (detailed further in Business Rule)

o **Status date:** date the consumer has enrolled onto the ECOP Pending enrollment

o **Start date:** date the enrollment was created

o **End date** the date the enrollment has been terminated, transferred, or withdrawn

Data Quality

ASAPs must follow the steps outlined in this Business Rule. ASAPs are required to track, report and evaluate which consumers have an ECOP pending care enrollment and the total number ECOP pending consumers. AGE will have statewide visibility of ECOP pending consumers to best manage allocations of the ECOP program, as described in PI-25-03 "Enhanced Community Options Program Maximum Enrollment Allowance" and subsequent versions.

To ensure data quality, report filtering and criteria are described below which will show consumers with incorrect settings for enrollment status or reason codes. ASAPs must view these reports monthly (at a minimum) in order to ensure that all consumers are correctly enrolled in the ECOP Pending Care Enrollment.

ASAPs must keep their consumer data accurate, and up to date within A&D on a timely basis. AGE reserves the right to review ECOP Pending care enrollments at any time.

A&D Data Entry Instructions

To ensure accurate reporting across the state, it is imperative that identified data elements are entered as instructed.

Element	Values	Notes
Care Enrollment	ECOP Pending	**Required** ***Only this care enrollment should be used, do not use other enrollments for this purpose**
Status	• **Waiting** • **Transferred** • **Terminated**	Default is **Active and must be updated**. AGE requires change of status as consumer is pending, assessed, and

		enrolled in the ECOP / Non-Waiver program or removed from the pending care enrollment list. **No other status is acceptable**
Status Reasons	• **Specific Status Reasons should be used for each of the appropriate Care Enrollment Statuses (Chart Below)**	Default status reason is **Blank**. AGE requires change of status and status reason as the applicant engages in and moves through the Home Care Program Intake process.
Status Date	Date Care Enrollment is created	
Start Date	Date Care Enrollment is created. Date Consumer is active for ECOP Pending	**Start date is always the date AGE is basing the report time frame on. This is used to identify the longest waiting consumer for ECOP pending.**
End Date	Date Care Enrollment is closed with appropriate status and reason	
Termination Date	Date Care Enrollment is closed with appropriate status and reason	

ECOP Pending Status and Reasons		
The care enrollment status and reasons listed below are the only approved statuses or reasons.		
Status	**Status Reason**	**Definition**
Waiting	Blank	Applicant appears to be eligible for ECOP / NW and is currently pending for an ECOP Enrollment slot to open.
Transferred	Transferred to ECOP (From ECOP Pending Status)	ASAP has received notification of an open ECOP slot. Consumer that has waited the longest on the ECOP Pending list, is determined to be clinically eligible and whose actual Care Plan cost meets program threshold and has enrolled into the ECOP program.
Terminated	Adequate Formal Support	Consumer has received additional formal support since enrolling on the ECOP Pending list and no longer needs to pursue ECOP enrollment.
Terminated	Adequate Informal Support	Consumer has received additional informal support since enrolling on the ECOP Pending list and no longer needs to pursue ECOP enrollment.
Terminated	ECOP Pending - Declined ECOP	Consumer no longer wants to pursue ECOP at this time.
Terminated	Death	Consumer has passed away prior to moving to ECOP.
Terminated	Denial	ASAP has an available ECOP slot and consumer was assessed, but determined to not be clinically eligible, or actual cost of service plan does not meet program threshold.

Adding Consumer to the ECOP Pending Care Enrollment

Once an ASAP has reached their maximum allowable enrollment target for ECOP / Non-Waiver, consumers who are deemed potentially eligible, based on the ECOP / Non-Waiver criteria, will be placed on the ECOP pending list through required care enrollment creation and monitoring.
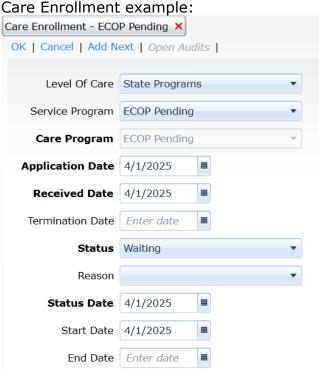
Steps to add a consumer to ECOP Pending:

In addition to their currently active Home Care enrollment, ASAP will create an enrollment for ECOP Pending confirming the consumer has been added to the ECOP Pending status.

Set the enrollment data elements as follows (see example below):
a. **Application Date and Received Date** = the date the home care intake process began, or in accord with agency process. These elements cannot be left blank, and the dates must be on or before the Start Date.

b. **Status** = WAITING. (Required)

c. **Reason** = Should be left blank

d. **Status Date** = <date of addition to the ECOP Pending list>. (Required)

e. **Start Date** = <date of addition to the ECOP Pending list>. (Required)

3. Document activities in **Journal Entries** as appropriate

Care Enrollment example:

Care Enrollment - ECOP Pending ✕

OK | Cancel | Add Next | *Open Audits* |

Level Of Care	State Programs ▼
Service Program	ECOP Pending ▼
Care Program	ECOP Pending ▼
Application Date	4/1/2025 ▦
Received Date	4/1/2025 ▦
Termination Date	*Enter date* ▦
Status	Waiting ▼
Reason	▼
Status Date	4/1/2025 ▦
Start Date	4/1/2025 ▦
End Date	*Enter date* ▦

ECOP Enrollment Capacity Availability

ASAPs are responsible for managing to their ECOP maximum enrollment allotment. Each month ASAPs will review their total number of enrolled active ECOP consumers and compare the total to their ECOP maximum enrollment allotment as provided by AGE. When an ECOP enrollment slot is available, consumers who are on the ECOP Pending list will be evaluated for ECOP program eligibility in accordance with PI-25-03. Consumers who have been on the ECOP Pending list the longest, will be evaluated first for the ECOP slot. Once a consumer is identified based on an available ECOP slot, the consumer's record should be reviewed and if still in need, the consumer should be assessed for ECOP clinical eligibility by an ASAP RN.

Once a consumer has been determined clinically eligible and meets program eligibility including minimum service threshold, the ASAP will then transfer the consumer from ECOP Pending into active enrollment in ECOP Non-Waiver. ASAP staff will use the status wizard to transfer from current Home Care enrollment to ECOP Enrollment. Once this step is completed, the ASAP

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must terminate the ECOP Pending Care enrollment citing an appropriate termination reason.

If a consumer has not met ECOP clinical or program eligibility when a slot is open, consumer will be terminated from the ECOP pending list.
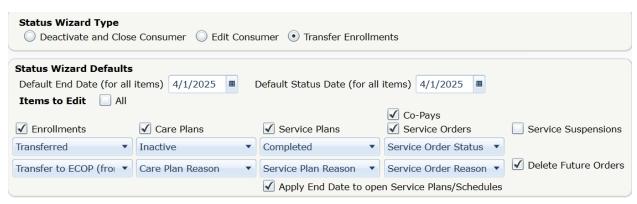
The ASAP may evaluate the next longest consumer on the ECOP Pending list for the open ECOP slot.
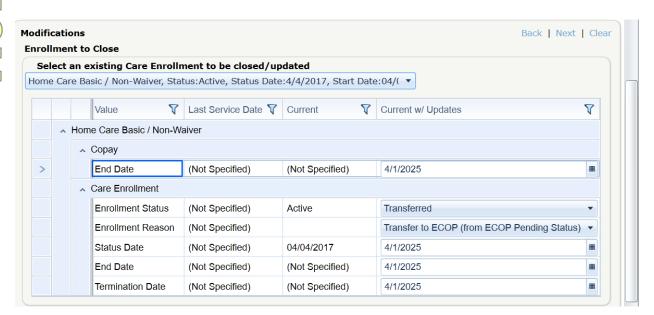
Promote Consumer to the ECOP Care Enrollment

Steps:

1. Use the **Status Wizard** - Transfer Consumer Enrollment. From the Consumer Summary screen, select Status Wizard - Transfer Consumer Enrollment.

2. On Screen 1 of **Status Wizard** - Transfer Consumer Enrollment, set the enrollment data elements (which refer to the currently active Home Care enrollment only) as follows:

   a) **Default End Date** = <last day on ECOP Pending list>
   b) Default Status Date = <last day on ECOP Pending list>
   c) **Enrollment Status** = TRANSFERRED. We are transferring the client from ECOP Pending Status to the corresponding care program
   d) **Enrollment Reason** = Transfer to ECOP (from ECOP Pending Status). NOTE: the reason codes are specific to the process and actual care programs, so that EOEA's statistics are accurate. Take care to select appropriate reason codes
   e) **Care Plans** = Set old care plan to inactive as new care plan will be under ECOP
   f) **Service Plans** = Set old service plans to Completed
   g) **Co-pay** = Check off co-pay to make sure old co-pay will be updated.

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3. On Screen 2, validate that all settings are correct from Screen 1. Make sure that the reason code entered on Screen 1 has carried over to screen 2.
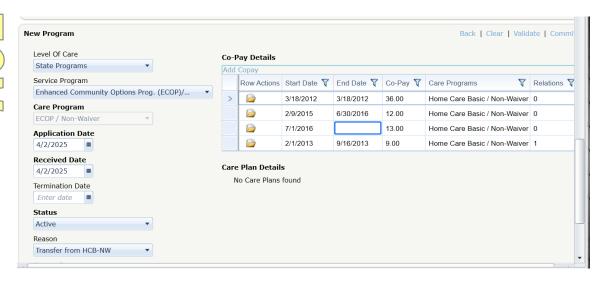

4. As prompted by the Wizard, create Enrollment to ECOP Non-Waiver. Set the elements as follows (be sure to scroll down to see all fields):

a) **Care program Name** = Enhanced Community Options Prog. (ECOP) / NW
b) **Application Date and Received Date** =<the date the intake process began>, or in accord with agency process. Do not delete: these elements cannot be left blank, and the dates must be on or before the Start Date. Suggested: use the corresponding dates from the ECOP Pending Enrollment.
c) **Status** = ACTIVE
d) **Reason** = Transfer from Current Home Care Program
e) **Status Date** = <date of transfer>

f) **Start Date** = <first date in program>. Note: this should be the day *after* the consumer's last date on the ECOP Pending list.

g) **End Date** = BLANK

Status Wizard example: creating new enrollment and updating co-pays

5. **Add / Edit Co-pay as needed**. Be sure to end the old Home Care enrollment co-pay and create new ECOP / NW co-pay.

6. Validate and commit to confirm all steps are accurate and complete. **Status Wizard** process is finished, and consumer should have ECOP / Non-Waiver care enrollment and care plan created.

7. Document all completed A&D activities in **Journal Entries** as appropriate

8. Create/update ECOP / NW Care Plan following transfer in program to review accuracy, add new services, or update existing services with adjusted schedules as needed.

9. Ensure Home Visit activities are adjusted to account for the quarterly home visits required in the ECOP program.

Terminating Consumer from ECOP Pending

Whether a consumer is enrolling in ECOP after being active on the ECOP Pending list or being removed from the ECOP Pending list before enrolling, the ECOP Pending enrollment will need to be terminated.

Care Enrollment must be updated accordingly:

a) **Termination Date** = <last day on ECOP Pending list>
b) **End Date** = <last day on ECOP Pending list>
c) **Enrollment Status** = Terminated or transferred based on chart above.
d) **Enrollment Reason** = Reason must match the specific instance in why the enrollment is closing per the chart located above
e) **Status Date** = <today's date>

Reporting:

To ensure accurate reporting across the state, it is imperative that ASAPS monitor data entry and reconcile as required. ASAPS must utilize reporting through HAR to track current ECOP pending consumer status as well as identify needed data validation.

Report Monitoring:
• ASAP – Monthly