



## Executive Office of Elder Affairs

RESPECT INDEPENDENCE INCLUSION

**Program Manager / Nurse  
Manager Meeting  
Tuesday, February 13, 2024  
2:00 – 3:30 PM**





A photograph of a woman with grey hair, wearing a white knit beanie and a teal jacket, smiling in a snowy outdoor setting. In the background, two other people are visible in a snowy field with evergreen trees.

# Welcome & Attendance

\*For ASAP utilization only. Not for distribution

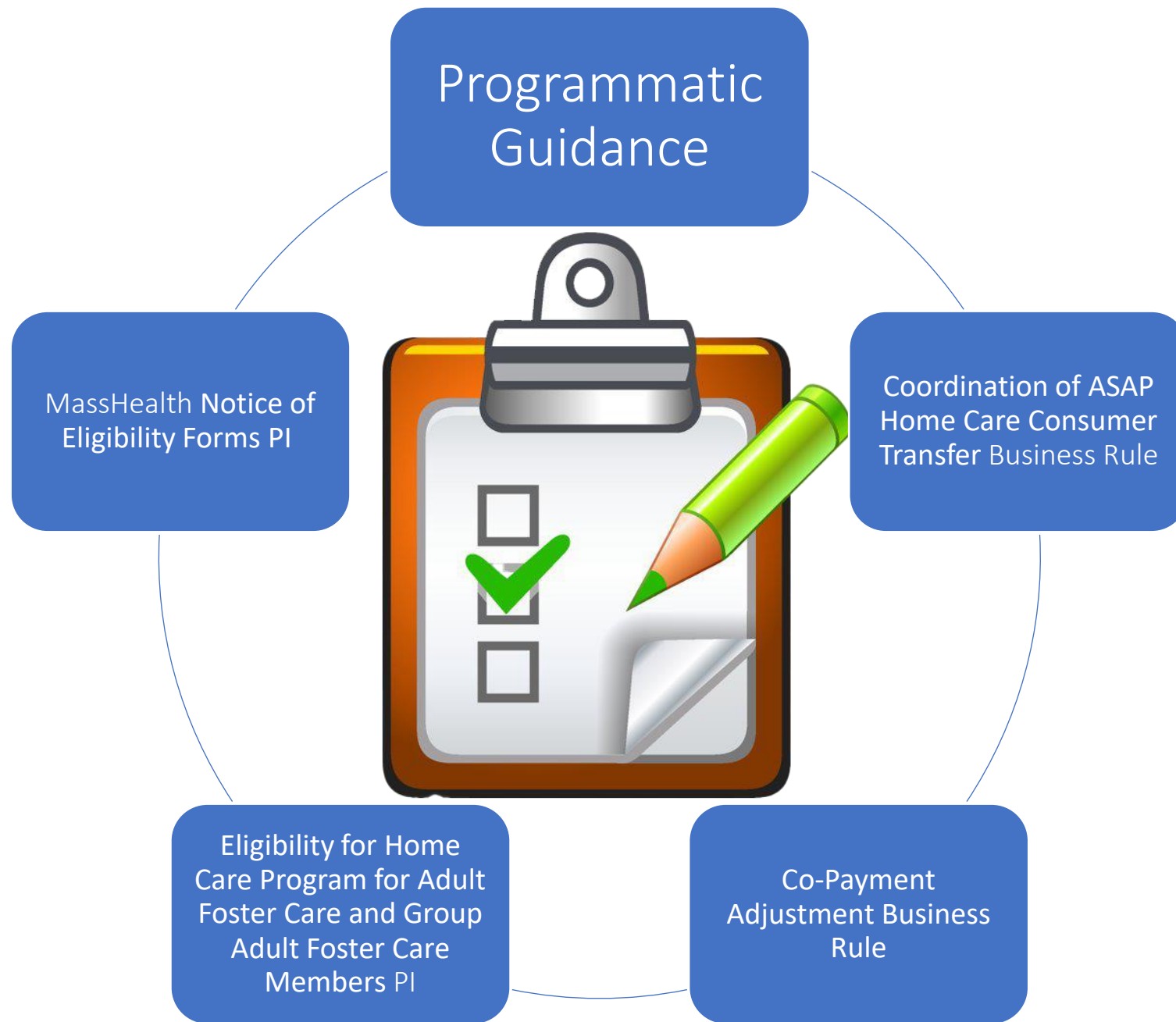
# AGENDA

- Welcome & Agenda
  - Welcome Back, Desiree!
- Home Care Operations
  - Programmatic Guidance
  - Consumer Directed Care Rates
  - Translated Documents
  - Home Care Program Modernization
  - Education Waivers
  - DTA Utilization Explorer Report
  - Home Care Intake
  - Revolving Referrals
  - Care Planning & Case Management
  - ASAP Consumer Connections
  - Centralized Reporting
- Programmatic Updates
  - Frail Elder Waiver (FEW)
  - CDS Updates
  - Certified Older Adults Peer Specialist/Supporting Older Adults Remotely (COAPS/SOAR)
  - Advocacy & Navigating Care in the Home with Ongoing Risks (ANCHOR)
  - Workgroup Updates
  - HC & CTLP Collaboration: Best Practices
- Communications
  - Communication & Coordination of A&D Requests
  - Upcoming HC Meetings & Trainings



# Home Care Operations





\*For ASAP utilization only. Not for distribution.

# ASAP Home Care Consumer Transfer Business Rule

Released September 7, 2023

- Goal of an ASAP Transfer is
  - smooth & seamless consumer transfer
  - meet the purpose of the Home Care Program as defined in 651 CMR 3.00 which is to assist older adults in the Commonwealth of Massachusetts to secure & maintain maximum independence in their home environment

[Coordination of ASAP Home Care Consumer Transfers - Business Rule - Document Library \(800ageinfo.com\)](https://www.800ageinfo.com/document-library/coordination-of-asap-home-care-consumer-transfers-business-rule)

# ASAP Home Care Consumer Transfer

## What is the process for NAPIS enrollments during transfers?

- Currently no requirement to close a NAPIS enrollment as the consumer remains in Massachusetts
- No prohibition that the Transferring ASAP can close a NAPIS enrollment & the Receiving ASAP can open a new NAPIS enrollment

# Co-Payment Adjustment Business Rule

Released December 12, 2023

- Provides guidance on the ASAP's ability
  - to waive or reduce a consumer's co-payment in accordance with 651 CMR 3.06 (2)(e)
  - gives examples of hardships that can be included (not inclusive)
    - high medical bills
    - high household bills
    - unforeseen repairs due to inclement weather
    - paying for care of dependents, etc.

[Co-payment Adjustment Business Rule - Document Library \(800ageinfo.com\)](https://800ageinfo.com/document-library/co-payment-adjustment-business-rule)



# Co-Payment Adjustment: Review & Decision Process

ASAPs are required to have a Copayment Adjustment Review & Decision process that includes

A written procedure outlining

- how ASAP staff offer the adjustment option
- apply for an adjustment on behalf of the applicant/consumer

Use of either

- EOECA Co-Payment Adjustment Application in A & D
- an ASAP customized Co-Payment Adjustment Application

Operational implementation

Staff training

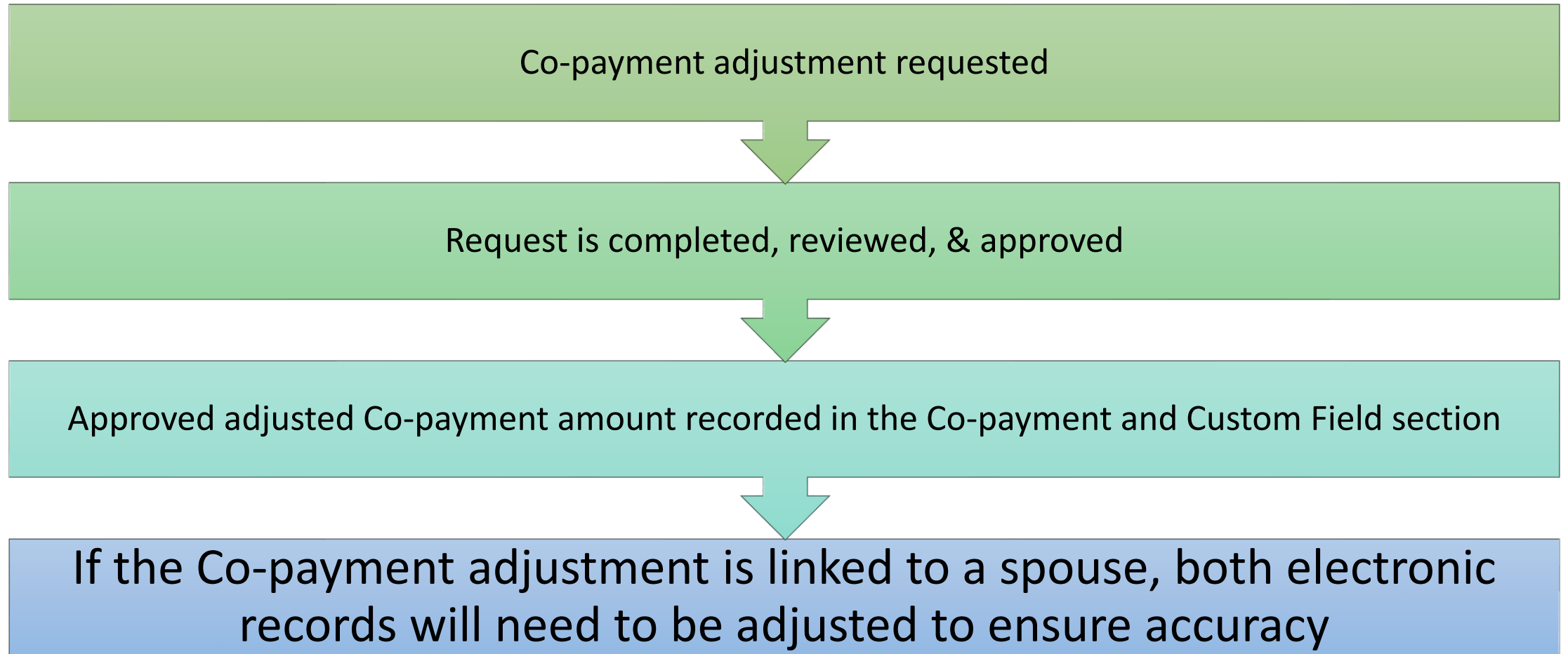
# Co-Payment Adjustment Review & Decision Process

## Other Key Components the ASAP Copayment Adjustment Review & Decision process should include

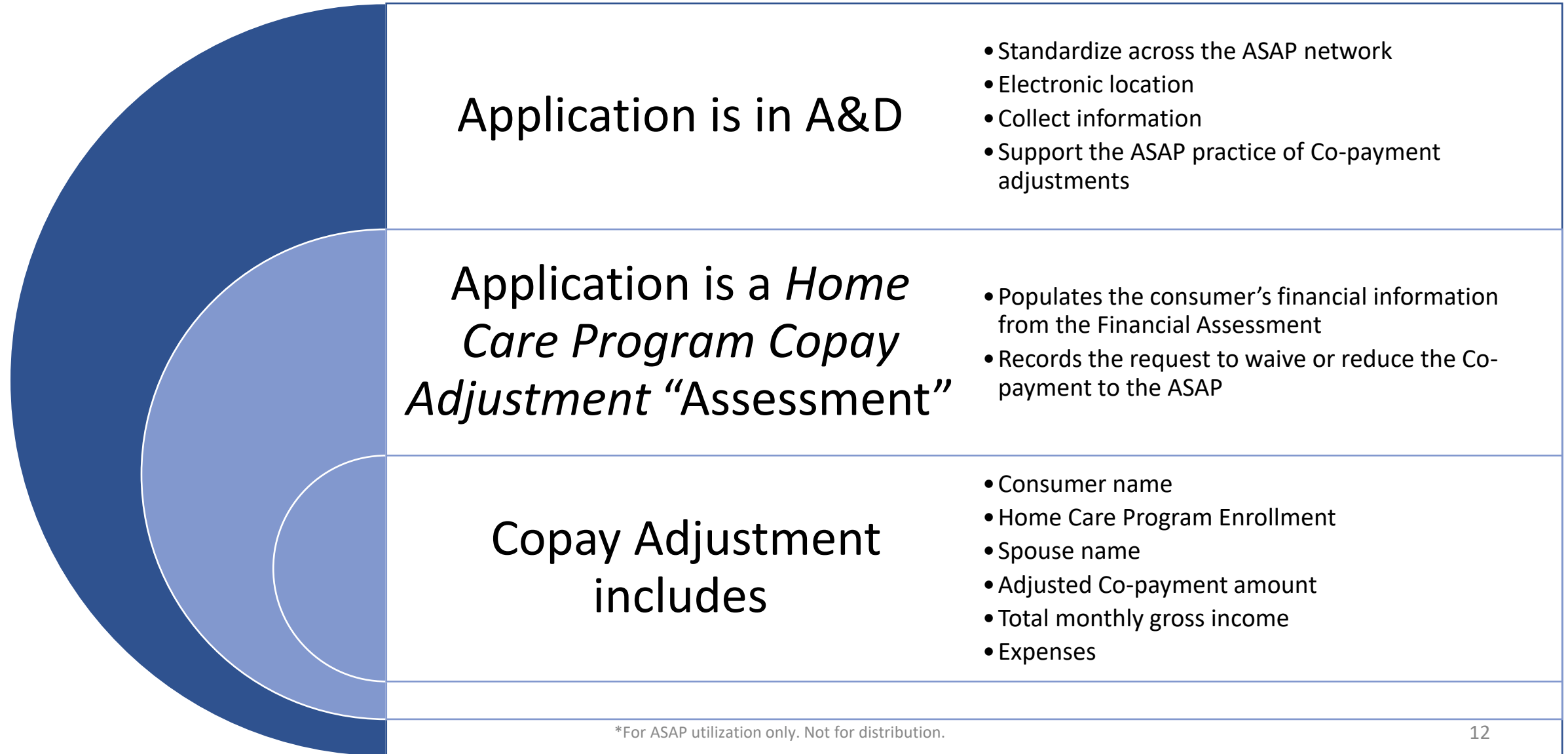
- How ASAP staff offer an adjustment to an applicant/consumer
- Documentation requirements for the adjustment request
- Adjustment request review process
- Consumer notification of decision
- Process for approvals & denials
- Documentation requirements in the consumer's record
- Reporting expectations
- Annual review & extension of adjustments
  - Documentation to support continued Co-payment adjustment



# Co-Payment Adjustment Business Rule in Aging & Disability (A & D)



# Co-Payment Adjustment Application in A & D





# PI 23-12: EOEA Requirements for MassHealth Notice of Eligibility Forms

Issued to network via email Nov. 15, 2023

- Effective Immediately

## Required Actions

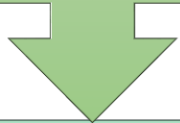
- ASAP must upload the completed Notice of Eligibility to the consumer A&D record
- Programs & Services:
  - Adult Day Health (ADH)
  - Frail Elder Waiver (FEW)
  - Nursing Facility (NF) Services
  - Group Adult Foster Care (GAFC)
  - State-Funded Community-Based Long-Term Services & Supports (CB-LTSS)




[PI 23-12 EOEA Requirements for MassHealth Notice of Eligibility Forms - Document Library \(800ageinfo.com\)](https://800ageinfo.com/document-library/PI-23-12-EOEA-Requirements-for-MassHealth-Notice-of-Eligibility-Forms)

# PI: 23-02 Eligibility for Home Care Program for Adult Foster Care & Group Adult Foster Care Members

Released April 7, 2023 – Effective Immediately



651 CMR 3.04 (1)(a)(1)states that “MassHealth members who meet Home Care Program eligibility criteria under 651 CMR 3.04 shall be eligible to receive Home Care Program Services provided that such services are determined to be **non-duplicative** with other MassHealth Services.”



Share with external providers that AFC & GAFC are **NOT** all-inclusive programs

[ELIGIBILITY FOR HOME CARE PROGRAM FOR ADULT FOSTER CARE AND GROUP ADULT FOSTER CARE MEMBERS PI-23-02 - Document Library \(800ageinfo.com\)](#)

# Consumer Directed Care (CDC) Rates

Network notification  
on Oct. 5<sup>th</sup> & Oct.  
18<sup>th</sup> 2023

MassHealth Personal  
Care Attendant (PCA)  
rates increased as of  
Sept. 1, 2023

Effective for CDC  
Consumers

PCA Rate Component	PCA Rate (Hourly)
PCA Wage Component	\$19.00
Employer Expense Component	\$2.05
Total PCA Rate	\$21.05



[Rate Bulletin: 2023 EOHHS Administrative Bulletins | Mass.gov](#)

# Translated Documents: Applicant Consent & Disclosure Form

English

Haitian Creole

Vietnamese

Arabic

Cape Verdean  
Creole

Simplified  
Chinese

Traditional  
Chinese

Khmer

Korean

Portuguese

Russian

Spanish

Polish

Italian

Hindi

Greek

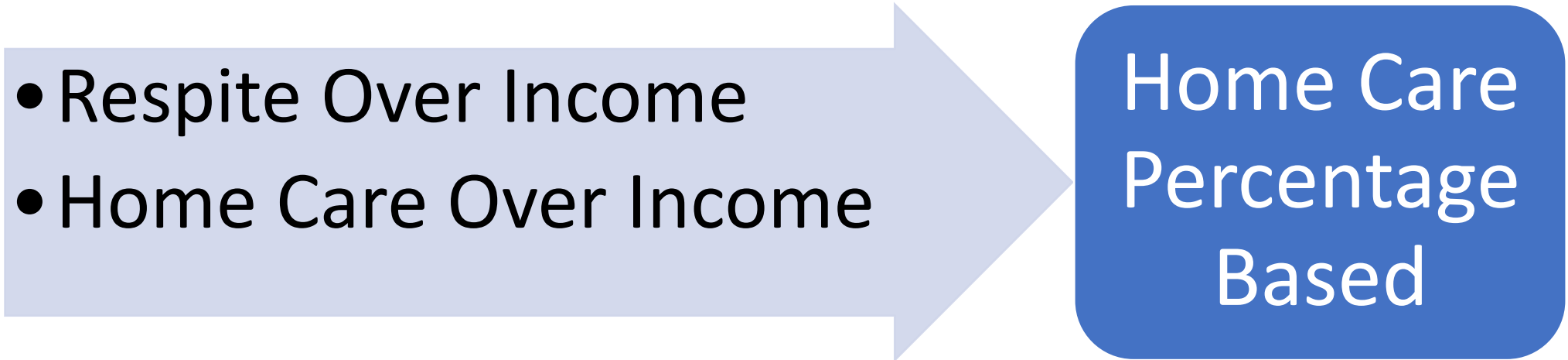
German

[Translated Documents: Applicant, Consent and Disclosure Form - Document Library \(800ageinfo.com\)](http://800ageinfo.com)



# Home Care Program Modernization

- Modernization of programs
  - Merging of Over Income (OI) Programs
    - Respite OI & Home Care OI
  - Consolidate into 1 program that will be renamed
  - Rename to new program – tentative: **Home Care Percentage Based**
  - Aligns with Cost Share schedule & change to refer to copay as % based
  - Effective – Summer 2024
  - Additional details coming soon

- 
- A diagram illustrating the program modernization. On the left, a light blue arrow points to the right. Inside the arrow, the text 'Respite Over Income' and 'Home Care Over Income' is listed. The arrow points to a blue rounded rectangle on the right containing the text 'Home Care Percentage Based'.
- Respite Over Income
  - Home Care Over Income

Home Care  
Percentage  
Based

# Updated Education Waiver Form

Issued to network via email October 31, 2023

- Request for Waiver of Education/Experience Standards Form
- Effective Immediately

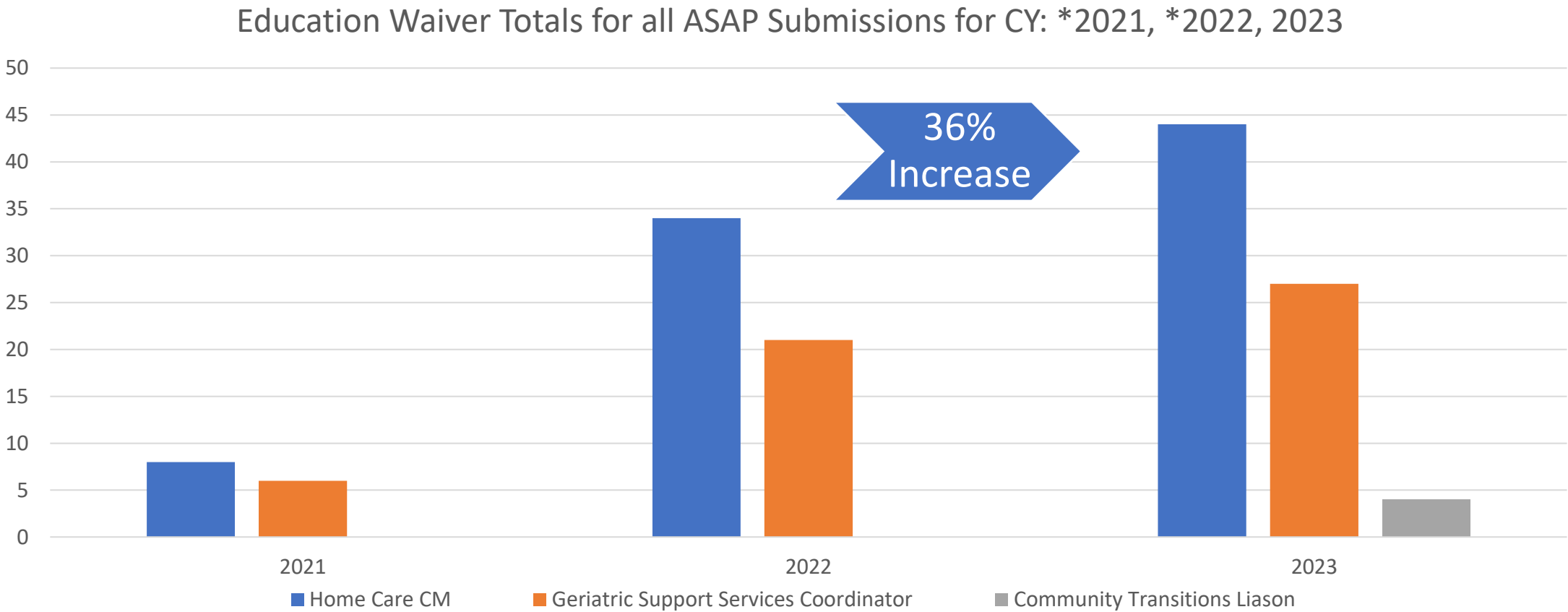
The current form encompasses changes inclusive of the following:

1. Added the CTL staff as a waiver candidate & language to describe specific skills or certifications of the waiver candidate that are essential to meet the needs of ASAP constituents
2. Updated email addresses & language to include clear delineation between standard ASAP staff training & the specific training needs of the waiver candidate
3. Form availability with PDF fillable access

[ASAP Staffing Requirements and Education Waiver Discussion Webinar - Document Library \(800ageinfo.com\)](#)

# Education Waiver Data: 2021, 2022 & 2023

Number of ASAP's Submitting Waivers:      CY 2021 (7)      CY 2022 (18)      CY 2023 (17)



\*CTL Program created in 2023 – therefore no submissions for CTL positions in 2021 or 2022

# DTA Utilization Explorer Report

- ASAPs are contractually required to review the DTA SNAP Report monthly & follow up according to Business Rule
- (<https://umassmed.typepad.com/files/dta-utilization-report-in-explorer-final-4.23.18.pdf>)
- Current Usage CY2022 to present as of January 30<sup>th</sup>, 2024

ASAP	#over 60 days	ASAP DTA Utilization Report (last view date)
AgeSpan	53	1/22/2024
ASNCM	25	10/4/2023
Berkshire	18	8/7/2023
Boston Senior	32	1/17/2024
Bristol	28	2/7/2023
Cape Cod	33	9/28/2023
Central Boston	21	1/24/2024
Coastline	30	1/22/2024
Ethos	15	1/22/2024
Hessco	22	3/3/2023
Highland	22	1/25/2024
LifePath	22	9/29/2023

ASAP	#over 60 days	ASAP DTA Utilization Report (last view date)
Lynn	30	10/18/2023
Minuteman	2	11/20/2023
Mystic	52	1/30/2024
OCES	44	no views
SCES	17	1/2/2024
SeniorCare	1	11/27/2023
South Shore	36	1/22/2024
Springfield	22	1/22/2024
Springwell	30	1/22/2024
Tri Valley	22	1/20/2023
West Mass	16	no views
Worcester	19	1/3/2024

\*For ASAP utilization only. Not for distribution.



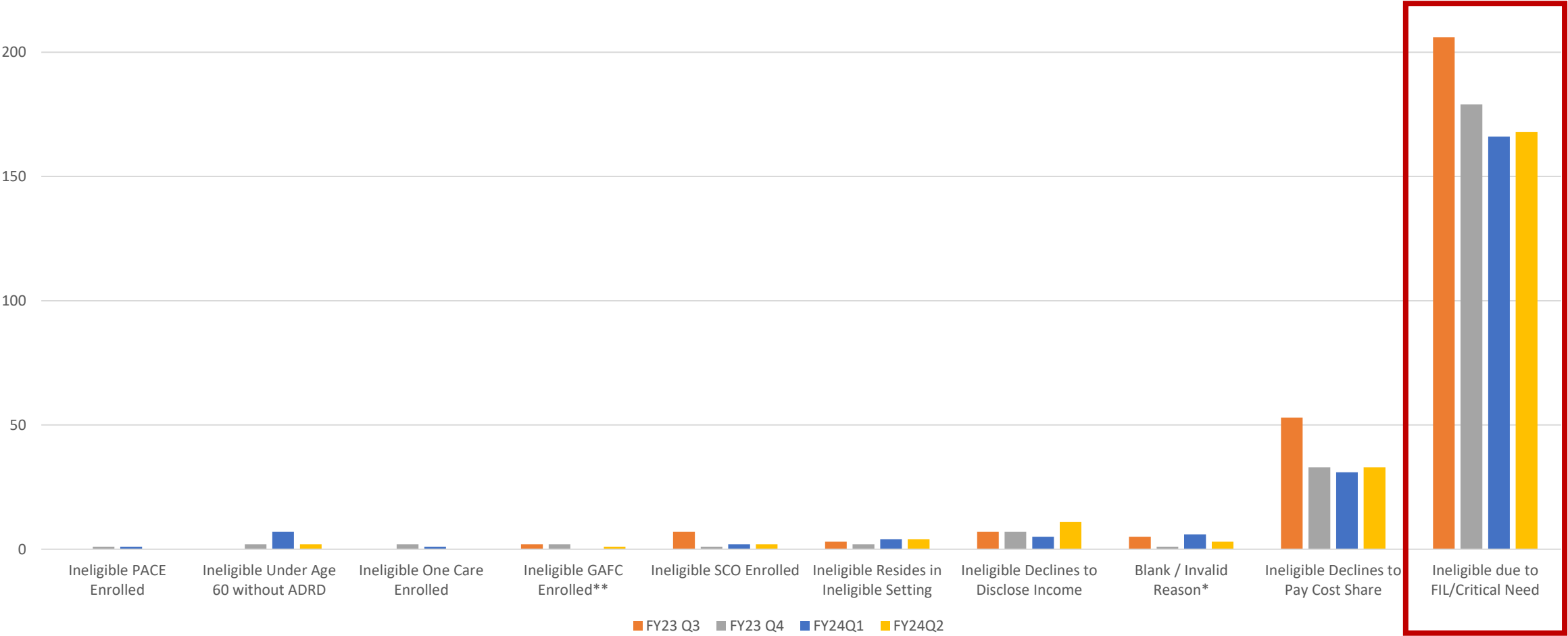
# Home Care Referral & Intake



\*For ASAP utilization only. Not for distribution.

# Home Care Referral & Intake – FIL Ineligibility

Comparison of Home Care Intakes with Status of Ineligible by Reason  
(FY23 Q3 - FY24 Q2)



\*For ASAP utilization only. Not for distribution.

# Home Care Referral & Intake – FIL Ineligibility

## Determining FIL Ineligibility at Intake

1. **Requires an Assessment** to be able to determine Ineligible based on FIL
2. Assessments **must be conducted in person** to review Applicant's ADL & IADL capabilities in person
3. **Must confirm applicant** does not meet an Exception for the Uniform Intake Policy

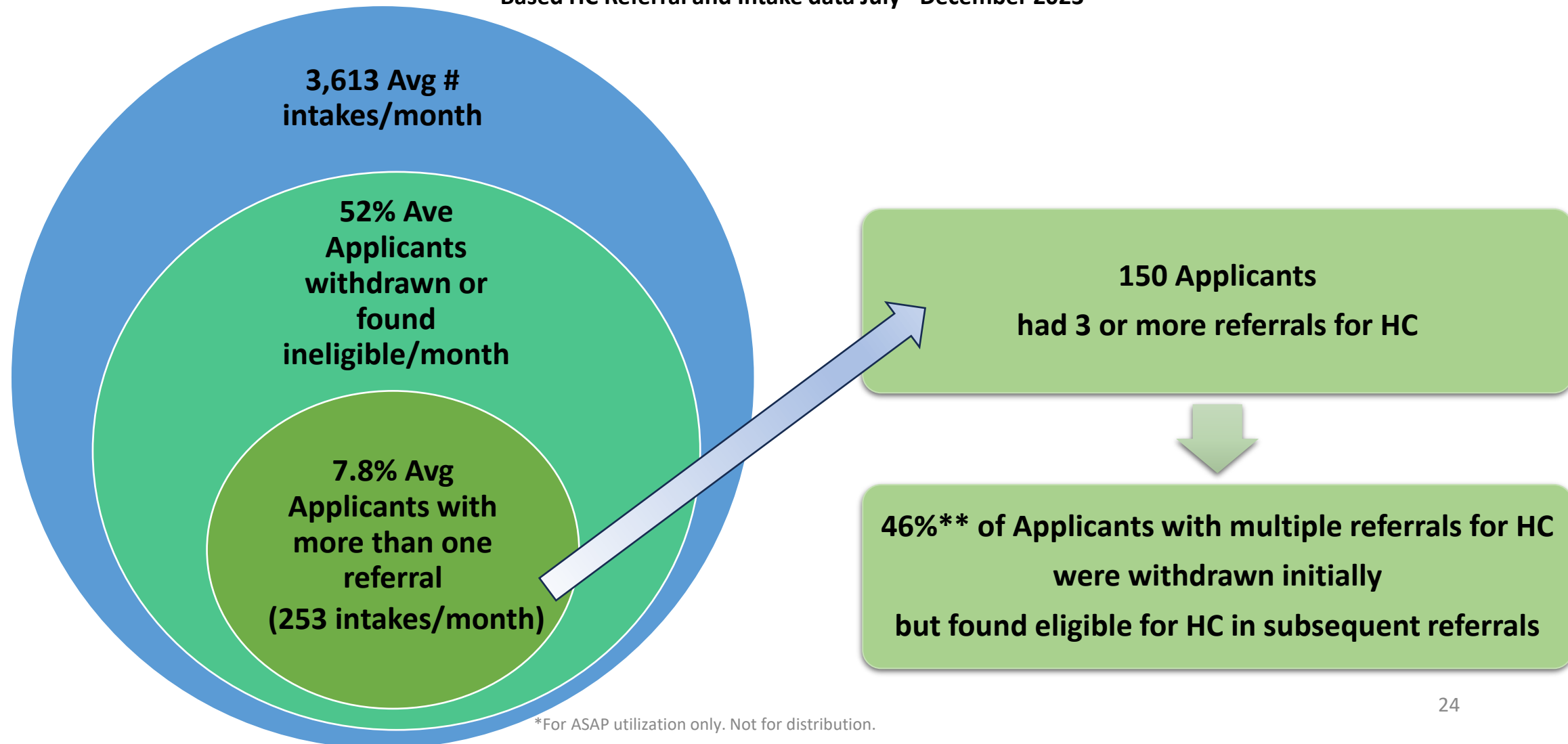
## If confirmed FIL Ineligible, must have

1. Notice of Ineligibility mailed out following assessment
2. Appeal Rights sent out at the same time
3. Documentation in journal note to support ineligibility, Notice of Ineligibility & Appeals were provided to applicant

# Home Care Referral & Intake Revolving Referrals

## 6-MONTH STATEWIDE AVERAGES

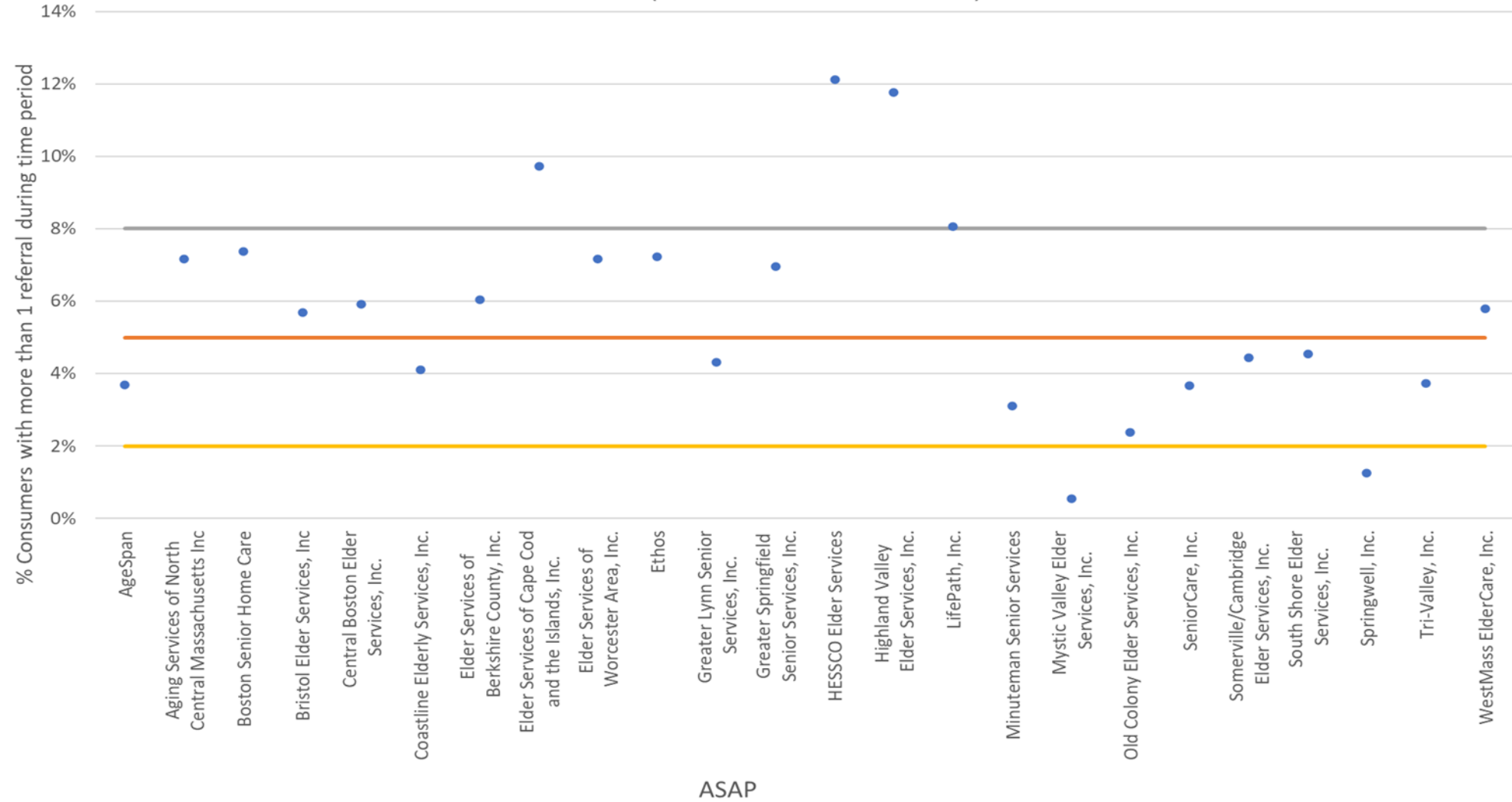
**\*\*Based HC Referral and Intake data July - December 2023**





# Referral and Intake

## % Consumers with Multiple Referrals within 90 days by Aging Service Access Point (October-December 2023)



— Average — Upper Control Limit — Lower Control Limit • % of Consumers with Multiple Referrals

\*For ASAP utilization only. Not for distribution.

# Rescinding ASAP Home Care Consumers Closures

At times terminated consumers may need to be re-opened into the Home Care Program

ASAPs should consider:

- Timeframe between closing & request to reopen or new referral
- Family involvement
- Closure method (VAF or NOA)
- JE documentation & communication with consumer

In certain cases, EOEa may allow cases to be re-opened after a short time frame from termination without a new initial assessment

# Care Planning & Case Management Service Authorizations

Authorization of Services for Spouse's or Individuals within the same home

- Authorization of:
  - Homemaking (HM)
  - Personal Care (PC)
  - Home Health Aide (HHA)
- Care Plans must reflect assessed service provision level for each consumer



## EXAMPLE:

- Mr. & Mrs. Smith are married & live together
- Mr. Smith's assessed needs
  - 3 hours of HM
  - 3 hours of PC
- Mrs. Smith's assessed needs
  - 1.5 hours of HM
  - 2.5 hours of PC

## DO NOT:

- Authorize Mr. Smith for,
  - 4.5 hours of HM
- Authorize Mrs. Smith for,
  - 5.5 hours of PC

## DO:

- Authorize Mr. Smith for,
  - 3 hours of HM
  - 3 hours of PC
- Authorize Mrs. Smith for,
  - 1.5 hours of HM
  - 2.5 hours of PC

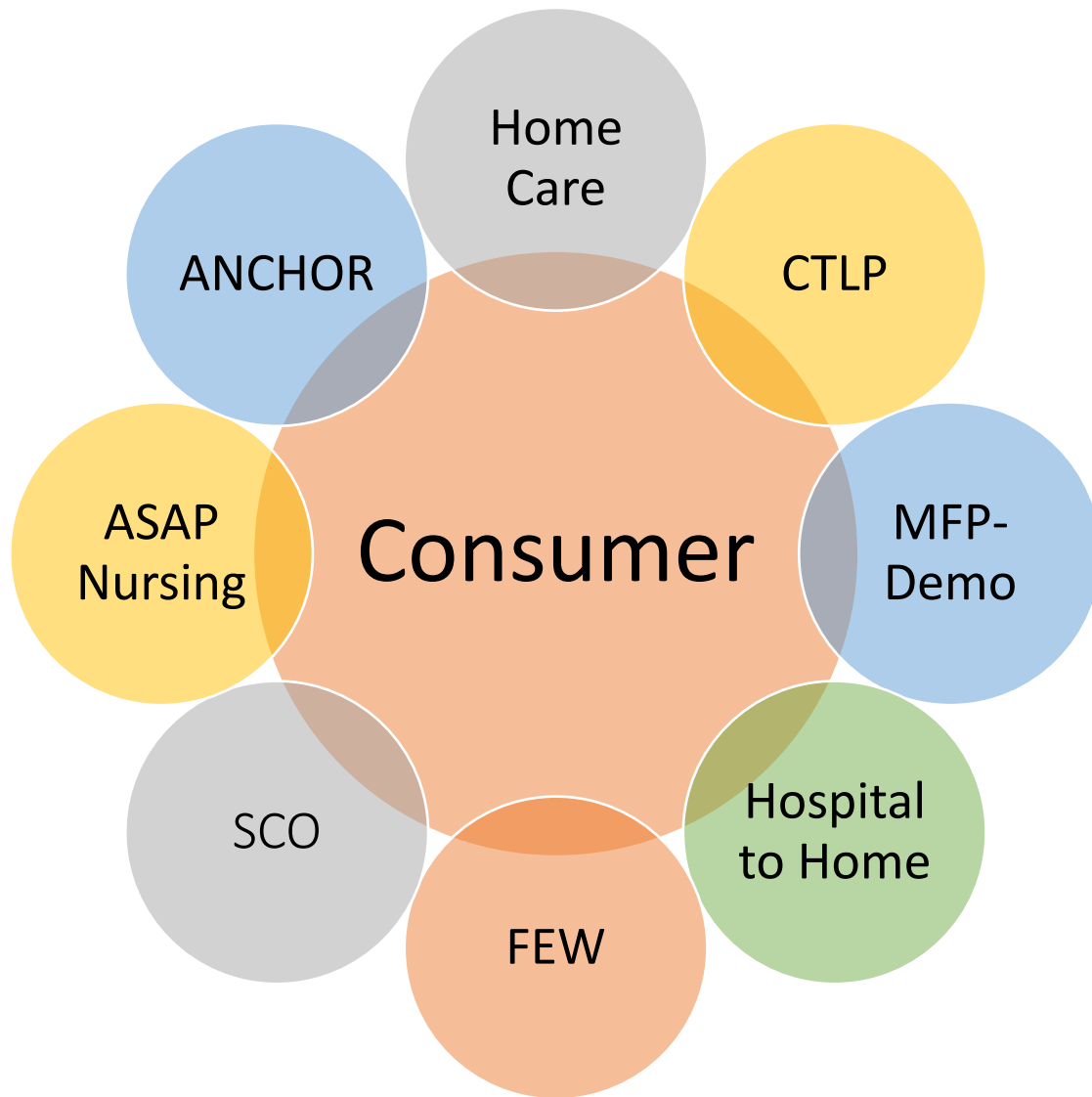
# Opening the Front Door



# Closing the Back Door



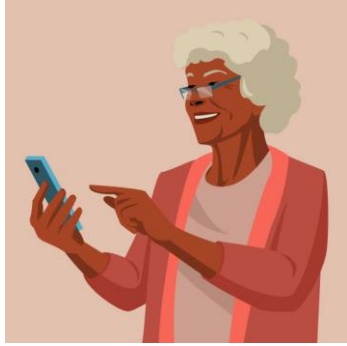
# ASAP Consumer Connection Points



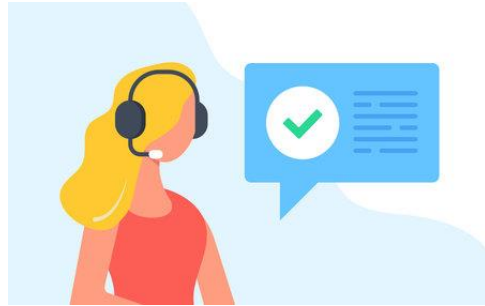
## Considerations

- Multiple consumer connection points to ASAPs
- Meeting the consumer where they are
- Person Centered Care Planning
- Termination from one program impacts others
- Review for additional program eligibility
- Interdisciplinary Team reviews
- Reporting
  - Referral & Intake
  - Terminations
  - HAR Reporting
  - ANCHOR enrollments
  - CTLP Enrollments and terminations

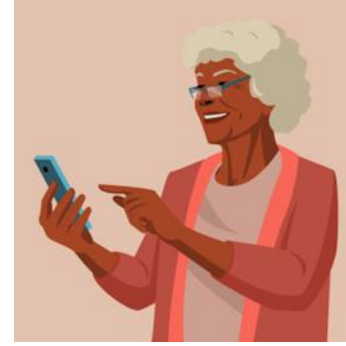
# ASAP Consumer Life Cycle Trends



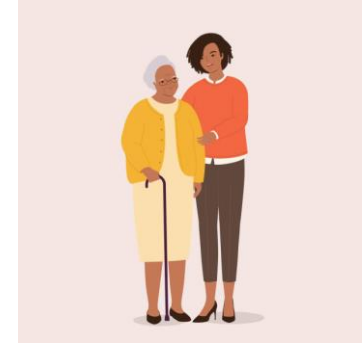
Call to I&R  
for  
Information



Provided  
Resource  
Information



Call to I&R



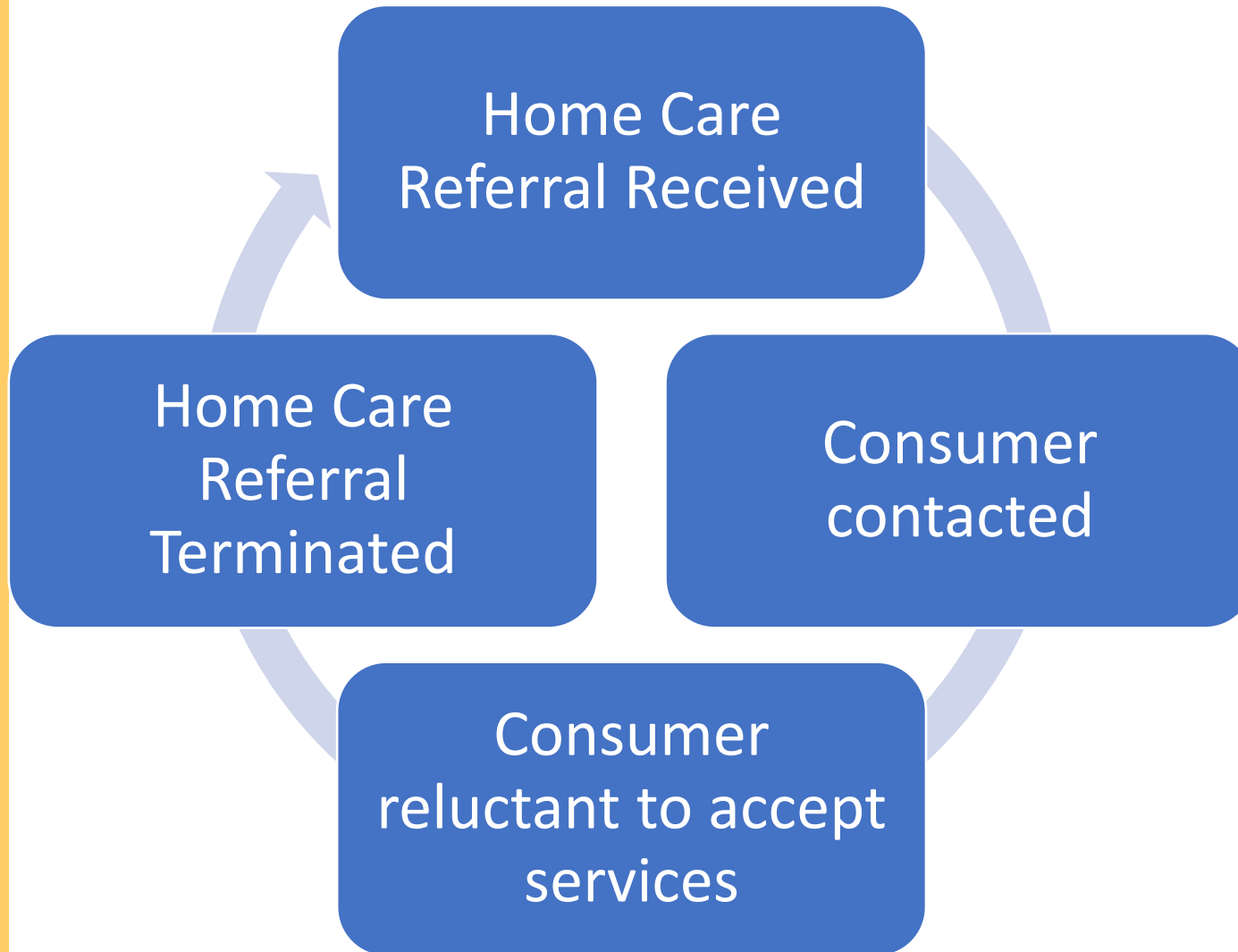
Home Care  
Referral

## Considerations:

- What types of information requests should yield a Home Care Referral?



# ASAP Consumer Life Cycle Trends



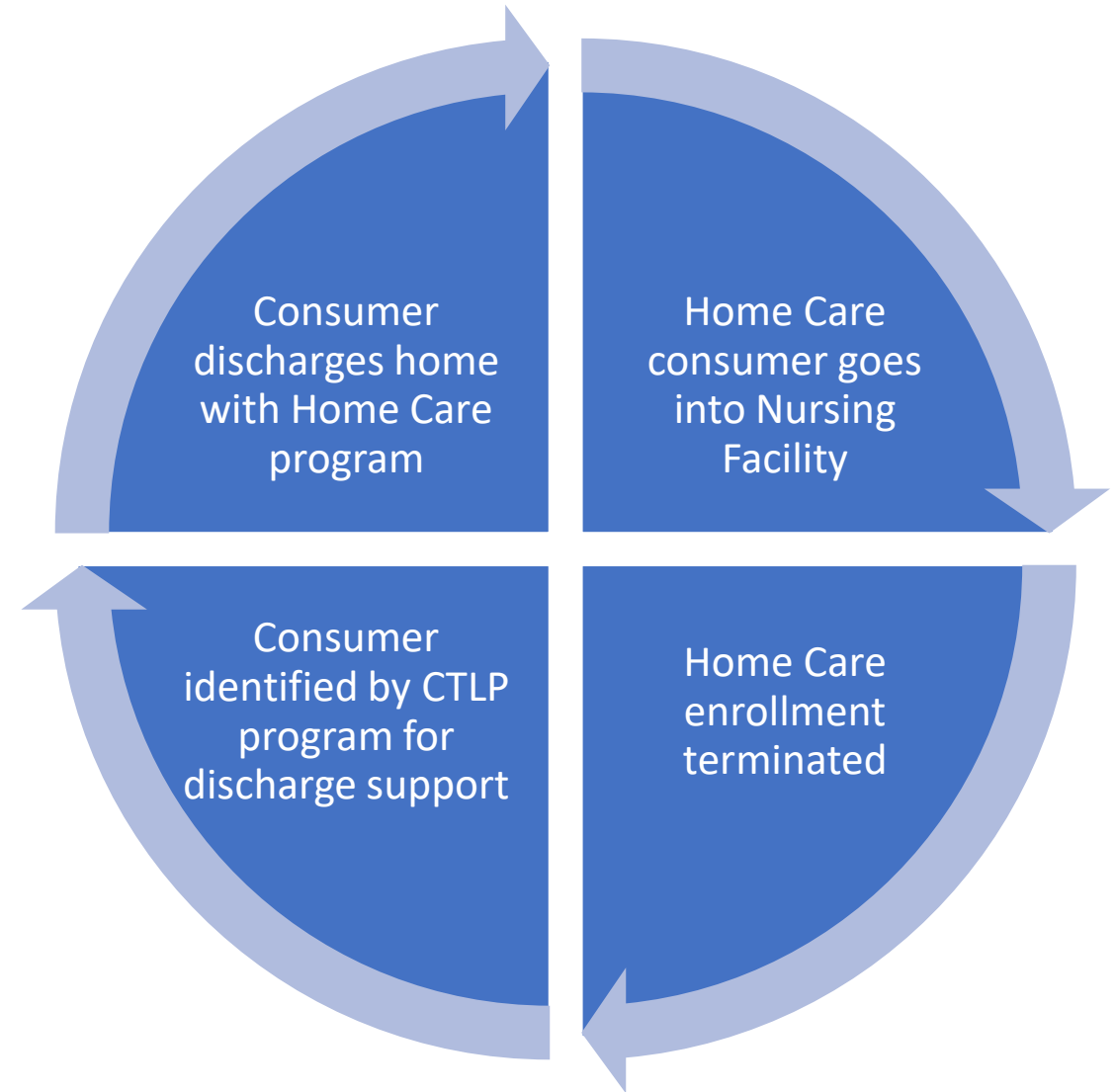
## Considerations:

- Interdisciplinary Case Review prior to terminating Home Care Referral
- ANCHOR appropriate Consumer
- Exception to Home Care Eligibility

# ASAP Consumer Life Cycle Trends

## Considerations:

- Interdisciplinary Case Review with internal colleagues (CAE RN, CTLP)
- Supervisory Review prior to terminating enrollment
- Supporting Consumer through increased services (ie: ECOP or FEW)
- Money Follow the Person Demo
- Home Care enrollment maintained to reduce need for new Home Care Intake



# Available Centralized Reporting – 800ageinfo

Aging & Disability For Professionals

Serving Massachusetts Older Adults and People with Disabilities

Reports & Data

EOEA Analytics for ASAPs & AAAs

About Money Management Blog800ageinfo HomeFor Professionals HomeSubscribe

Categories

CAE - Clinical Assessment & Eligibility (174)

Caregiver (3)

Census (27)

Consumer Profile (13)

Cost Sharing (1)

Data Verification (2)

Home Care (94)

Housing - Supportive & Congregate (2)

Information & Referral (357)

Invoice (1)

Nutrition (2)

Payment Voucher (2)

Program Enrollment (42)

Protective Services (283)

Report Definition (2)

Research (1)

Home Care Monthly Report - FY24 December 2023

Home Care Monthly Report - FY24 December 2023

This report includes the following information:

A detailed breakdown of the Home Care Enrollment information

A breakdown of the Active Enrollments at the End of the Month for the individual ASAPs

Visual charts detailing the specific information

General Home Care data charts

Download Home Care Monthly Report - Dec 2023

Reporting Period: FY24 (December 1, 2023 - December 31, 2023)

Posted on Jan 26, 2024 in Home Care | Permalink

Search

Search

Subscribe to this blog's feed

More For Professionals

Aging & Disability For Professionals (home)

Document Library

AGD Support

ALR-IR Support

Caregiver Direct Plus

COA Administrator

Community Links Portal Resources

Elder Protective Services

<https://reportsdata.800ageinfo.com/>

# Programmatic Updates



\*For ASAP utilization only. Not for distribution.

# Frail Elder Waiver (FEW)



\*For ASAP utilization only. Not for distribution.

# FEW Renewal Update



Submitted  
to CMS  
September  
2023

Formal  
requests for  
additional  
information  
from CMS

Updated &  
Resubmitted  
November  
2023

90-day  
extension of  
current  
waiver

Approval of  
FEW  
Renewal  
Application  
TBD



# Frail Elder Waiver Quality Reporting (372 Reporting)

Inclusive of Health & Welfare Measures

Case Management Workbooks

Due Date to EOE

February 1, 2024

Provider Workbooks

Due Date to EOE

March 6, 2024

All measures must meet compliance threshold (86%)

MA Expedited Timeline

Due to CMS June 2024



# FEW 300% Income & Spousal Limits



## 2024 Waiver Financial Waiver Eligibility

- 300% SSI FBR monthly income limit =\$2,829
  - All applicant's income reviewed individually (separate from spouse if applicable)
- \$2,000 applicant asset limit
- Spousal Asset Limit = \$154,140

\*MassHealth is the only entity who can determine financial eligibility.  
All individuals who want to apply, can.



# CDS Updates

- **Section J.3** – Additional Diagnoses/Symptoms Reported, Not Confirmed

## Removed

- PSYCH-Mental Retardation

## Added

- NEURO/Intellectual Disability
- NEURO/Developmental Disabilities

**Considerations for this change:** ASAPs running reports for these specific diagnoses may need to update the report to the new CDS questions.

Additional updates to the new CDS version will also be rolled out, notice forthcoming over the next few weeks on what the changes will be & when the new CDS will be available.

\*For ASAP utilization only. Not for distribution.

# Certified Older Adults Peer Specialist/Supporting Older Adults Remotely (COAPS/SOAR)

## COAPS

- Targeted recovery services for consumers with behavioral health challenges
- Encompasses a range of activities focused on recovery & community integration
- Utilizes certified older adult peer specialists to promote self-advocacy & community engagement

## SOAR

- Module-based intervention delivered by older adult peer specialists
- Addressing the whole health of older adults in the community
- Education on older adult mental health & normal age-related changes
- Provided 1:1 virtually (via telephone or live video)

# COAPS/SOAR

- ASAPs ***must*** seek contracts for ***both*** COAPS & SOAR services for parity throughout the Commonwealth
- Reach out to [Amanda.L.Myers@Mass.Gov](mailto:Amanda.L.Myers@Mass.Gov) for any technical assistance related to these services and/or contracting for these services



# COAPS/SOAR Trainings

Defining COAPS and SOAR services (11/13/23)

Discussing contracting & providing resources  
for potential contracts (12/6/23)

Upcoming: Discuss updates to contracting,  
check-in on progress towards gaining  
contracts (2/22/24 at 2pm)



[Certified Older Adult Peer Specialists \(COAPS\) / Supporting Older Adults Remotely \(SOAR\) - Document Library](#)  
[800ageinfo.com](http://800ageinfo.com)

# Advocacy & Navigating Care in the Home with Ongoing Risks (ANCHOR)



- ANCHOR is a Home Care program providing highly-focused, goal-oriented care management (intensive care management).
  - This service is a more frequent, rigorous, & time-intensive delivery of advocacy & other supports to older adults with behavioral health needs who are at risk of institutionalization or homelessness due to inability to accept or retain services

**Upcoming network training on ANCHOR  
March 6th at 11:00 AM**

In-depth look at the ANCHOR service including, program components, expectations, & consumer examples

[ANCHOR \(Advocacy & Navigating Care in the Home\) - Document Library \(800ageinfo.com\)](https://800ageinfo.com/document-library/anchor-advocacy-navigating-care-home)



# Consumer Directed Care/Fiscal Intermediary Workgroup Update

Workgroup	Workgroup Goals	Status
<ul style="list-style-type: none"><li>• Convened May 2023</li><li>• ASAP Staff<ul style="list-style-type: none"><li>• Program</li><li>• Contracting</li><li>• Fiscal</li></ul></li></ul>	<ul style="list-style-type: none"><li>• Review best practices &amp; efficiency</li><li>• Identify areas for improvement</li><li>• Standardize processes</li></ul>	<ul style="list-style-type: none"><li>• Working on implementation of recommendations<ul style="list-style-type: none"><li>• Form Revision</li><li>• Process Improvement</li><li>• Communication</li></ul></li></ul>

# Pending Services Workgroup Update



## Work Group Goal

- Identify best practices
- Identify helpful enhancements
- Review current pending service referral process
- Identify on-going targeted agenda topics

## Kick Off Meeting

- January 24<sup>th</sup>, 2024
- Focused on identifying best practices
- Identified initial targets to review for potential enhancements to the process

## Next Meeting

- February 26<sup>th</sup>, 2024
- Focus on identifying helpful enhancements to the current system

# Home Care & CTLP Collaboration: Best Practices

## HC Consumer Admitted to Nursing Facility (NF)

- HC Care Managers
  - Are required to follow their consumers when they are in the NF
  - May connect with CTLP Liaison when consumer is admitted to NF
  - Should continue to take the lead on transition assistance while CTLP provides support
  - May recommend consumers meet with CTLP to discuss obstacles to returning to community and assist with discharge planning

## CTLP Consumer transitioning to community with HC

- CTLP and HC to coordinate assessments
- CTLP to coordinate warm handoff to HC Care Manager

# Communications



\*For ASAP utilization only. Not for distribution.

# Communication & Coordination of A&D Requests from ASAPs

Considerations when submitting requests to make changes to: A&D services, activities, journals, care enrollments, etc.

Engage with your ASAP network colleagues on current or future best practices

**AND**

Consult Attachment A, ASAP Contract, and other regulatory guidance documents

Changes to A&D may impact other A&D functionality and programmatic operations

SIMS Support coordinates requests with Home Care operations



\*For ASAP utilization only. Not for distribution.

# Upcoming Home Care Meetings & Trainings

Date & Time	Program	Subject	Audience
Thursday, February 22 <sup>nd</sup> 2:00 to 3:00	COAPS/SOAR	COAPS/SOAR Learning Collaborative	ASAP Network
Wednesday, March 6th 11:00am to 12:00pm	ANCHOR	ASAP Network Anchor Training	ASAP Network
Thursday, March 21 <sup>st</sup> 1:00pm to 2:00pm	HHPP	Hospital to Home Partnership Program (HHPP) Learning Collaborative	ASAP & Hospital HHPP Staff
June 2024 (Date TBD)	PM and NM staff	Program Manager and Nurse Manager Network Meeting	ASAP HC Program & Nursing Staff

\*For ASAP utilization only. Not for distribution.

\*For ASAP utilization only. Not for distribution.

# Appendix



# Appendix

- Lynn Vidler – Senior Director of Operations & Policy for Home Care Programs
  - Email: [Lynn.Vidler@mass.gov](mailto:Lynn.Vidler@mass.gov)
- Devon Garon - Director of Home & Community Programs
  - Email: [Devon.Garon@mass.gov](mailto:Devon.Garon@mass.gov)
- Desiree Kelley – Clinical Nurse Manager
  - Email: [Desiree.Kelley@mass.gov](mailto:Desiree.Kelley@mass.gov)
- Shannon Turner – Home Care Program Coordinator
  - Email: [Shannon.K.Turner@mass.gov](mailto:Shannon.K.Turner@mass.gov)
- Melissa Enos – Home Care & Program Analytics Nurse
  - Email: [Melissa.A.Enos@mass.gov](mailto:Melissa.A.Enos@mass.gov)
- Brian Glennon – Home Care Waiver Program Manager
  - Email: [Brian.M.Glennon@mass.gov](mailto:Brian.M.Glennon@mass.gov)
- Nicholas Roberts – Home Care Data Analyst
  - Email: [Nicholas.P.Roberts@mass.gov](mailto:Nicholas.P.Roberts@mass.gov)

# Appendix

- Dawn Hobill – Quality Manager
  - Email: [Dawn.Hobill@mass.gov](mailto:Dawn.Hobill@mass.gov)
- Joel Bartlett – Home Care Provider Coordinator
  - Email: [Joel.D.Bartlett@mass.gov](mailto:Joel.D.Bartlett@mass.gov)
- Dana Beguerie – Frail Elder Waiver / Senior Care Options Liaison
  - Email: [Dana.Beguerie@mass.gov](mailto:Dana.Beguerie@mass.gov)
- Amanda Myers – Behavioral Health Program Coordinator
  - Email: [Amanda.L. Myers@mass.gov](mailto:Amanda.L.Myers@mass.gov)
- Brenda Correia – Subject Matter Expert
  - Email: [Brenda.Correia2@mass.gov](mailto:Brenda.Correia2@mass.gov)
- Julianna Santiago – Community Transition Liaison Program Manager
  - Email: [Julianna.Santiago@mass.gov](mailto:Julianna.Santiago@mass.gov)
- Carissa Kushmerek – Community Transition Liaison Program Coordinator
  - Email : [Carissa.Kushmerek@mass.gov](mailto:Carissa.Kushmerek@mass.gov)