

ANNUAL REQUIREMENTS

There are certain processes and documentation requirements that are required to be completed annually (at a minimum) after enrollment. These annual requirements include:

- A face to face home visit for completion of the Service Coordination Assessment. (See Comprehensive Assessment section)
- Review and obtain authorizing signatures on the following:
 - Rights and Responsibilities and Acknowledgement Form;
 - Privacy Policies and Acknowledgement Form; and
 - Authorization for Disclosure of Consumer Medical and Health Information as needed for specific information requests.
- Review the participant/family's emergency management plan. If a plan is not in place, provide emergency response materials and offer assistance in creating a plan.
- Review MO HealthNet eligibility status. Document the participant's eligibility status in the SHS Information System under the MO HealthNet contact type. Make a referral to MO HealthNet if a change takes place that affects the participant's MO HealthNet eligibility.
- Annual Financial Eligibility Review (AFER) – process for reviewing continued financial eligibility which takes place from January 1 to June 30 each year. Information on the AFER process and forms to be used are available on the AFER secure site.
- Review medical eligibility. A Health Certification Form (HCF) is sent to either the primary care physician or specialist upon initial enrollment. A HCF must also be obtained any time there is a change in the participant's medical condition (i.e. addition or deletion of a diagnosis).
- Review participant information (i.e. address, responsible party, responsible party address, insurance coverage) and update the SHS Information System as appropriate.

It is recommended that all forms requiring review and signature (other than the AFER forms) be discussed with participants during the annual face to face visit for completion of the annual assessment. In order to meet the needs of participants, service coordination activities may require more than annual visits and documentation.