



MISSOURI DEPARTMENT OF
**HEALTH &
SENIOR SERVICES**

Division of Senior & Disability Services

HCBS FUSION
Provider End User Guide

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1 Login

ABOUT THIS SECTION

This section describes how to access FUSION and reset your password.

1.1 HOW TO LOG INTO FUSION

❖ To log into FUSION:

- Step 1:** Open your web browser (e.g., Chrome, Edge, Safari) and go to: <https://modhss-qa01.echo.tylerfederal.com/login>
- Step 2:** Enter your **Username**, which will be your email address, and DSDS-provided temporary **Password**.
- Step 3:** Click the **Sign On** button



BY SIGNING ON TO THIS SYSTEM YOU ARE AGREEING TO THE SITE'S SECURITY & PRIVACY POLICY BELOW.

A screenshot of the login interface. It shows a username field with the placeholder "fname.lname@oa.mo.gov" and a password field with masked characters. Below the fields are a "Sign On" button and a "Reset Password" link. Yellow callout circles with numbers 2 and 3 point to the password field and the "Sign On" button, respectively.

- Step 4:** When logging in for the first time, you must change your password. Read the password requirements and enter your new **Password**. Re-enter to **Confirm Password**.

Step 5: Click the **Change Password** button.

This password has expired. You must change your password to continue using this application.

Password should be at least eight characters long and must contain a combination of uppercase and lowercase letters, numbers, and special characters, and should be different from your last 10 passwords.

4

5

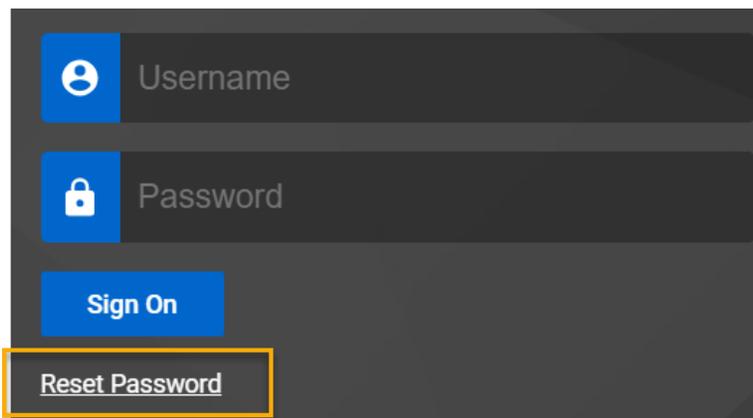
Change Password Cancel

1.2 HOW TO RESET YOUR PASSWORD

While a password reset is enforced upon your first login, there may be instances where you wish to reset it proactively or need to do so at the request of DSDS.

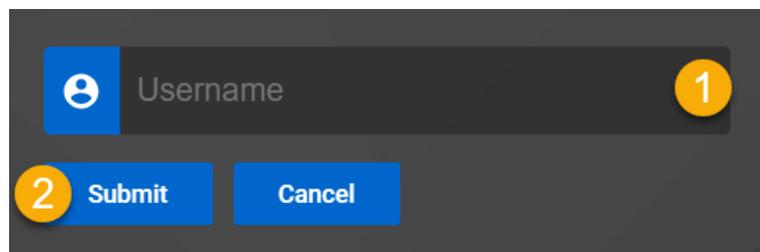
❖ To reset your password:

Step 1: Navigate to the login screen and click **Reset Password**.

A screenshot of a login interface with a dark grey background. It features two input fields: 'Username' with a person icon and 'Password' with a lock icon. Below these fields are two buttons: 'Sign On' and 'Reset Password'. The 'Reset Password' button is highlighted with a yellow rectangular border.

Step 2: Enter your **Username**.

Step 3: Click the **Submit** button.

A screenshot of the login interface showing the 'Username' field and two buttons: 'Submit' and 'Cancel'. A yellow circle with the number '1' is positioned to the right of the 'Username' field, and another yellow circle with the number '2' is positioned to the left of the 'Submit' button.

A confirmation of your request submission is displayed saying an email has been sent to you with a confirmation code.

Step 4: Navigate to your email and open the item titled **Password Reset**. Highlight and **copy** the code provided within the email.

A password reset has been requested for MO DSDS.

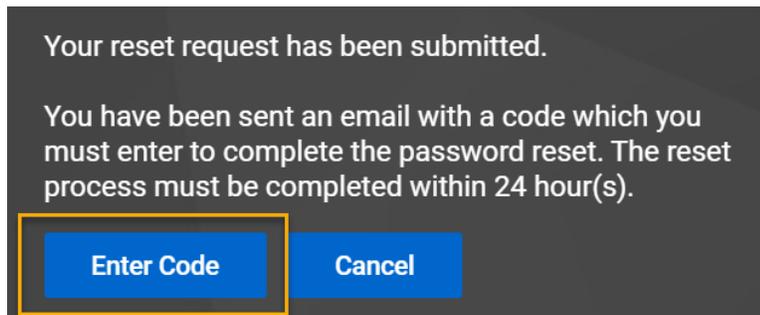
To reset your password please open the site, click on a Password Reset link, and enter the code provided below.

Please note that the code will expire in 24 hour(s).

Code

If you didn't request a password reset please contact your system administrator.

Step 5: Return to the reset screen and click the **Enter Code** button.



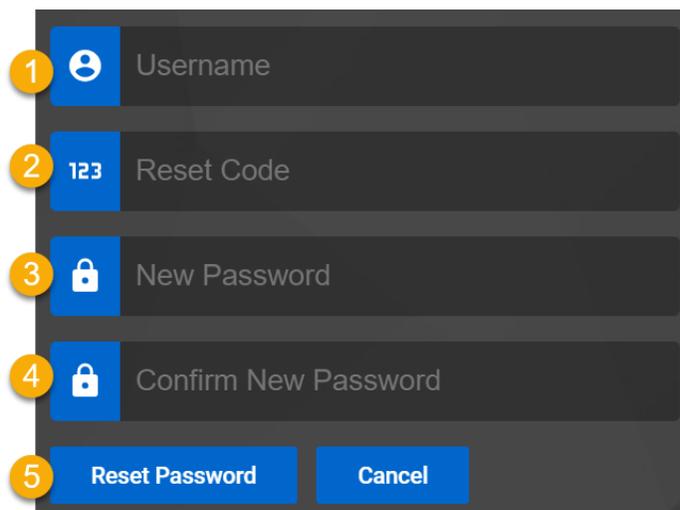
Step 6: Enter **Username**.

Step 7: **Paste** or **enter** the **Reset Code** from your email.

Step 8: Enter your **New Password**.

Step 9: Re-enter to **Confirm New Password**.

Step 10: Click on the **Reset Password** button.



Step 11: Confirmation of the password change is provided. Click the **Sign On** button to login to FUSION.

Your password has been successfully changed.

 smith@email.com

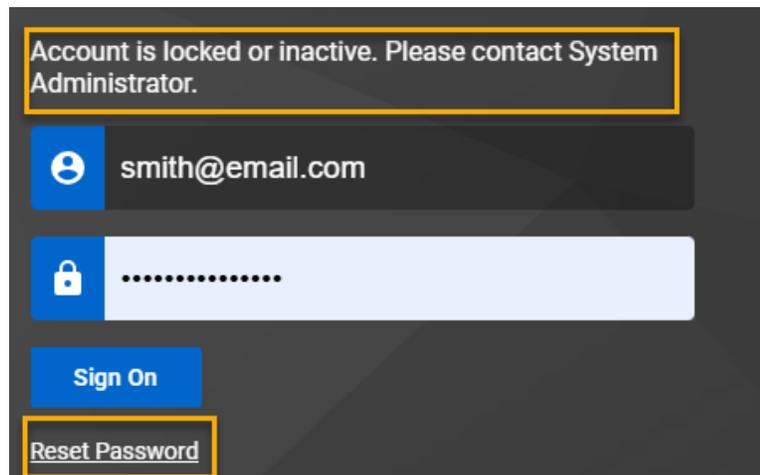


Sign On

1.3 UNLOCK A LOCKED ACCOUNT

❖ **To unlock a locked account:**

Step 1: If the locked message is shown while trying to login, click on **Reset Password** and follow the instructions in Section 1.2.



2 Participant Search

ABOUT THIS SECTION

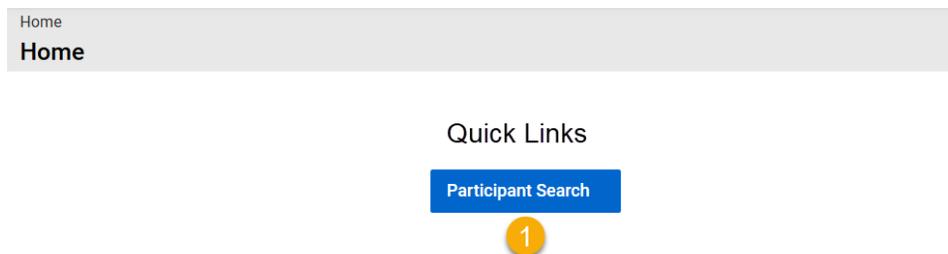
This section describes how to search for a participant.

2.1 SEARCH FOR A PARTICIPANT

The home dashboard includes a participant search feature.

❖ To search for a participant:

Step 1: From the home screen dashboard, click on **Participant Search**.



Step 2: Enter the **DCN** of the participant. *Note: This field is required.*

Step 3: Enter *either* the participant's **Last Name**, or **DOB**. *Note: One or the other is needed to search for the participant.*

Step 4: Click **Search**.

The screenshot shows the 'Participant Search' form. It has a title bar 'Participant Search'. Below it are several input fields: 'Last Name' (with 'Petunia' entered), 'First Name' (with 'either' entered), 'DOB (MM/dd/yyyy)' (with '07/05/1991' entered), 'DCN' (with '96417293' entered), and 'SSN' (empty). A blue 'Search' button is at the bottom. Yellow arrows and circles with numbers 1, 2, 3, and 4 indicate the steps: 1 points to the 'Participant Search' button, 2 points to the 'DCN' field, 3 points to the 'Last Name' and 'DOB' fields, and 4 points to the 'Search' button.

Step 5: Click on the button to select the participant.

Step 6: Click on **View**.

Participant Search

Last Name	<input type="text" value="petunia"/>
First Name	<input type="text"/>
DOB (MM/dd/yyyy)	<input type="text"/>
DCN	<input type="text" value="96417293"/>
SSN	<input type="text"/>

	Last Name	First Name	DOB (MM/dd/yyyy)	DCN
<input checked="" type="radio"/> 5	Petunia	Josephine	07/05/1991	96417293

6

3 Participant Dashboard

ABOUT THIS SECTION

This section describes how to view information about a participant.

3.1 PARTICIPANT PROFILE

❖ To view a participant profile:

Step 1: Navigate to **Home > Participant Search** and select the participant. The screen defaults to the **Participant** profile tab within the Participant dashboard.

PETUNIA, JOSEPHINE (96417293)
ME Codes: 11 (1/1/2020 - Present) Care Plan Roll-Up: [View](#) Current Care Plan: 7/15/2024 - 6/30/2025

DOB: 07/05/91 Age: 33 Legal Guardian(s): None Lock Ins: None Case Notes: [+New](#)

Participant Referral Assessment PCCP Request Notes Document Contacts

Step 2: Make any changes or additions to the data where fields are accessible. The following sections/fields allow for edits:

a. General Information

- i) COOP Priority (Select from dropdown)

b. Demographic Info

- i) County (Select from dropdown)
- ii) Language Preference (Select from dropdown)
- iii) Marital Status /Living Arrangements (Select from dropdown)

c. Contact Information (DSDS Participant Info)

- i) Email Address (Enter email address)
- ii) Secondary Phone (Enter phone number)
- iii) Best Time to Call (Enter text)
- iv) Mailing Address

- v) Physical Address (For Assessments)
- vi) Address Notes (Enter any other notes)

d. Safety and Special Accommodations

- i) Legally Blind (Checkbox)
- ii) Hearing Impaired (Checkbox)
- iii) Special Communication Needs (Select from dropdown)
- iv) Other Accommodations (Enter text)
- v) Safety Concerns (Enter text)
- vi) Record Retention Date (Enter Date)

Step 3: After making any changes or additions, click **Save**

Special Accommodations		Safety Concerns	
Legally Blind	<input type="checkbox"/>	Safety Concerns	<input type="text"/>
Hearing Impaired	<input type="checkbox"/>	AFO Regulated Entity Id	
Special Communication Needs	<input type="text"/>	AFO Assessment Type Id	
Other Accommodations	<input type="text"/>	AFO Care Plan Type Id	
		Record Retention Date	<input type="text"/> (mm/dd/yyyy)
		Exclude from Record Retention	



3.2 STATUS CHECKS

The participant dashboard features multiple tabs, each displaying the status of different participant aspects.

3.2.1 Check the Status of a Referral

❖ **To check the status of a referral:**

Step 1: Navigate to the Participant record and click on the **Referral** tab.

Step 2: Click on a row to view the expanded referral screen .

Referral Type	Referrer Name	referred currently in hospital	Facility Type	Discharge Date	Status	Assigned To	Risk	Referral Sent Date
Phone					Sent for Assessment	Tiffany Staff	High	09/04/2024

Step 3: The system displays the referral information:

General Information	
Status	Sent for Assessment
Assigned To *	HeatherAssessor/Sup Olsen
Initially Assigned Date	10/22/2024
Last Assigned Date	10/22/2024
Received Date *	02/01/2024
Risk *	Low

Primary medical conditions related to the person's need for HCBS

Have you or an immediate family member ever served in the U.S. Armed Forces? Yes No

Step 4: If the referral results in an assessment, you can click **View the Related Assessment Page** link to navigate to the assessment:

General Information	
Status	Sent for Assessment
View Related Assessment Page	

3.2.2 Check the Status of a PCCP Request

❖ To check the status of a PCCP request:

Step 1: Navigate to the Participant record and click on the **PCCP Request** tab.

HAZING, CONNIE (32688457)
ME Codes: 05 (1/1/2020 - Present) Care Plan Roll-Up: [View](#) Cur
DOB: 02/06/94 Age: 30 Legal Guardian(s): None Lock Ins: None Cas
Participant Referral Assessment **PCCP Request** Notes Document Contacts

Step 2: Select the PCCP Request record you want to review:

Assigned To	Form of Contact	Priority	Service Type	Provider	Status	Action Requested
Brendon Barnett	HCB Medicaid Referral - IM54a	APS Coordination	<ul style="list-style-type: none">ADCAPC		In Progress	Care Plan Change (from Referral)

Step 3: The system displays the PCCP Request details:

Status	New
Entry Date *	11/30/2024
Due Date	
Assigned To	Brendon Barnett
Initially Assigned	11/30/2024
Last Assigned	11/30/2024
Details	
Action Requested *	Care Plan Change
Action Requested Sub Type *	Decrease
Form of Contact *	Phone
Risk *	Low
Provider	ABC Health
Service Type *	<ul style="list-style-type: none">CDS

3.2.3 Check the Status of an Assessment

❖ To check the status of an assessment:

Step 1: Navigate to the Participant record and click the **Assessment** tab:

HAZING, CONNIE (32688457)
 ME Codes: 05 (1/1/2020 - Present) Care Plan Roll-Up: [View](#) Current Ca
 DOB: 02/06/94 Age: 30 Legal Guardian(s): None Lock Ins: None Case Note
 Participant Referral **Assessment** PCCP Request Notes Document Contacts

Step 2: Select the assessment you want to review:

Participant Referral **Assessment** PCCP Request Notes Document Contacts

Column Filters (OFF) ▶

Status	Assessment Finalized	Assigned Assessor	Assigned Supervisor	Assessment Due Date	Assessment Date	Assessment Time	LOC Met
▶ LOC Met	11/26/2024	Heather Olsen	HeatherAssessor/Sup Olsen	12/12/2023	12/02/2023	12:00 PM	Yes
▶ LOC Met	10/22/2024	Heather Olsen	HeatherAssessor/Sup Olsen	02/15/2024	02/04/2024	12:00 PM	Yes
▶ LOC Met	10/30/2024	Brendon ProviderAssessor		01/31/2025	10/29/2024	12:00 PM	Yes

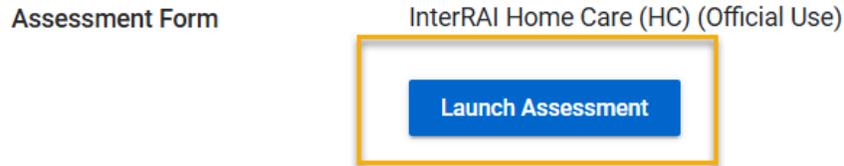
Step 3: The system displays the assessment details:

Assessment Information

Status	LOC Met	Assessment Due Date	02/15/2024
Download Assessment Package		Provider Reassessor Due Date	
View Related Referral Page		Assessment Date	02/04/2024
Assessment Type *	Initial	Assessment Time	12:00 PM
Reassessment Type		Assessment Finalized	10/22/2024
Assigned To *	Heather Olsen	Submitted by Assessor	10/22/2024
Assigned Supervisor *	HeatherAssessor/Sup Olsen	Completed By	Heather Olsen, Senior Social Services Specialist
PRR Reviewer		Reauthorization Date	
Risk *	Low	Closed Date	10/23/2024
Assessment Form	InterRAI Home Care (HC) (Official Use)		

[Launch Assessment](#)

Step 4: To view the completed InterRAI assessment form, click the **Launch Assessment** button:



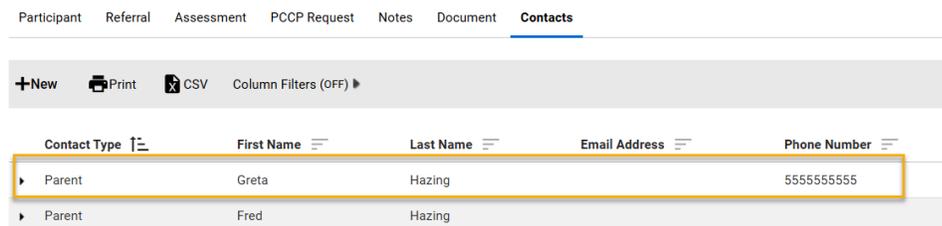
3.2.4 Review / Add Contacts

❖ **To review contacts:**

Step 1: Navigate to the Participant record and click on the **Contacts** tab.



Step 2: Select the contact you want to review:



Step 3: The system displays contact details:

Contact Type *	Parent ▼
Do Not Mail	<input type="checkbox"/>
First Name *	Greta
Middle Name	
Last Name *	Hazing
Email Address	
Address 1	123 Sesame Street
Address 2	
City	Alphabet
State	MO ▼
Zip Code	12345
Phone Number	5555555555
Fax Number	
Contact Notes	

❖ **To Add Contact:**

Step 1: Navigate to the Participant record and click on the **Contacts** tab

Step 2: Click **+New**

Step 3: Fill in the required fields and click the **Save** button.

Fax Number

Contact Notes

Lives with Participant

4 Provider Acceptance Review

ABOUT THIS SECTION

This section describes how to review care plans and approve or deny them.

4.1 REVIEW PROPOSED CARE PLAN

❖ To review a proposed care plan:

Step 1: From the home dashboard, select the **My Dashboard > Proposed Care Plans** queue.

Enhanced Inbox

Inbox Group Selection: My Dashboard (1)

Inbox Selection: Proposed Care Plans (2)

Step 2: Locate the Participant you wish to review in the list and click on the corresponding row for that Participant.

Participant Name	DCN	Proposed Care Plan Start Date	Proposed Care Plan End Date
Beverly Sprint 16	69583983	10/15/2024	09/30/2025

Step 3: The **Provider Acceptance** screen launches. Click on **View Proposed Care Plan**.

Provider Acceptance

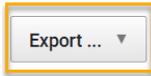
Date Sent for Review: 11/26/2024

Assigned Agency: Costa Vida

View Proposed Care Plan

Step 4: Review the Care Plan details. Click on **Export** to download a **PDF**, **Print**, or download as an **Excel** file.

Beverly Sprint 16 (DCN: 69583983) Care Plan: 10/15/2024



PA#	Task Type	Minutes Per Day	Days Per Week	Units Per Day
PC - CDS N/A 10/15/2024 - 09/30/2025 units 0 Units N/A PA: N/A				
N/A	Bathing	30	4	

4.2 ACCEPT PROPOSED CARE PLAN

❖ To accept a proposed care Plan:

Step 1: From the **Provider Acceptance** screen, click on the **Accept all proposed services?** dropdown and select **Approved**.

Step 2: Select **Yes** to **Approve with proposed care plan start date**.

Note: If you select “No” in the “Approve with proposed care plan start date field, this will indicate to DSDS that you accept the service plan, but not the start date of the services. The system will treat this as a denial and route to DSDS for review.

Step 3: Click on the **Save** button

Accept all proposed services?	Approved 1
Approve with proposed care plan start date *	<input checked="" type="radio"/> Yes <input type="radio"/> No 2
Proposed Care Plan Start Date	10/15/2024
Response Details	<div style="border: 1px solid #ccc; height: 50px;"></div>
Date Responded	
Service Types	RN, PC - CDS
<input data-bbox="391 1371 483 1415" type="button" value="Save"/>	3

4.3 DENY PROPOSED CARE PLAN

❖ To deny a proposed care plan:

Step 1: From the **Provider Acceptance** screen, select the **Denied** option from the **Accept all proposed services?** field:

Accept all proposed services?

Proposed Care Plan Start Date 10/15/2024

Step 2: Select an option from the **Primary Denial Reason** field:

Primary Denial Reason *

Step 3: Click on **Search Denied Services**.

Denied Services *

Step 4: The system displays a list of services assigned to your agency. Select one or more services to deny and click the **Done** button.

Step 5: Click the **Save** button.

Select All | Deselect All

<input checked="" type="checkbox"/> Authorized Nurse Visits
<input type="checkbox"/> Personal Care Assistance - CDS

5 Documents

ABOUT THIS SECTION

This section describes how to access existing and create new documents

5.1 VIEW DOCUMENTS

❖ To view documents:

Step 1: From the Participant record, click the **Document** tab.

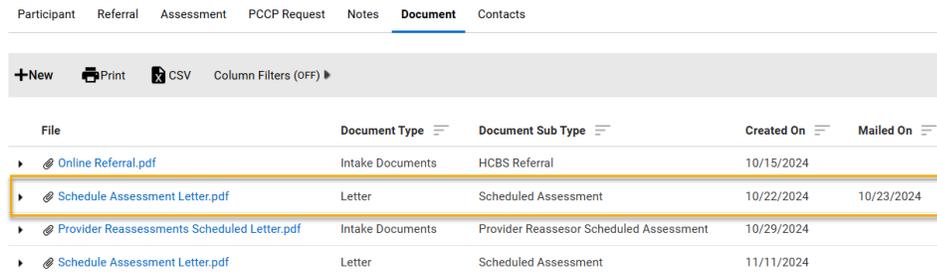


HAZING, CONNIE (32688457)
ME Codes: 05 (1/1/2020 - Present) Care Plan Roll-Up: [View](#) Curren

DOB: 02/06/94 Age: 30 Legal Guardian(s): None Lock Ins: None Case N

Participant Referral Assessment PCCP Request Notes **Document** Contacts

Step 2: Click the document record you want to review:



Participant Referral Assessment PCCP Request Notes **Document** Contacts

+New Print CSV Column Filters (OFF) ▶

File	Document Type	Document Sub Type	Created On	Mailed On
▶ Online Referral.pdf	Intake Documents	HCBS Referral	10/15/2024	
▶ Schedule Assessment Letter.pdf	Letter	Scheduled Assessment	10/22/2024	10/23/2024
▶ Provider Reassessments Scheduled Letter.pdf	Intake Documents	Provider Reassessor Scheduled Assessment	10/29/2024	
▶ Schedule Assessment Letter.pdf	Letter	Scheduled Assessment	11/11/2024	

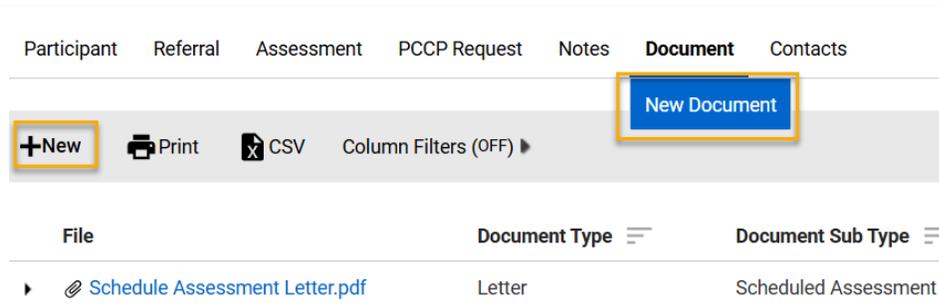
Step 3: You can also click on the document attachment link to directly download the document attachment from the listing screen:

File	Document Type	Document Sub Type
▶ Online Referral.pdf	Intake Documents	HCBS Referral
▶ Schedule Assessment Letter.pdf	Letter	Scheduled Assessment
▶ Provider Reassessments Scheduled Letter.pdf	Intake Documents	Provider Reassessor Scheduled Assessment
▶ Schedule Assessment Letter.pdf	Letter	Scheduled Assessment

5.2 ADD A NEW DOCUMENT

❖ To add a new document:

Step 1: From Participant record, click the **Document** tab and then click the **+New** button. Alternatively, hover over the **Document** tab and click **New Document**.



Step 2: Select a **Document Type** from the dropdown menu.

Step 3: Select a Document **Sub Type** from the dropdown menu.

Step 4: Click the file upload icon to select and upload the document. A **Status** of "Upload complete" will confirm the file upload.

Step 5: Click **Save**.

The screenshot shows the Document form. The navigation bar is the same as in the previous screenshot. The form has three fields: Document Type (Intake Documents), Document Sub Type (Ad-Hoc Letter), and File *. The File * field contains the file name 'Ad Hoc Letter.docx' and an upload icon. A status message 'Status: Upload complete.' is displayed below the File * field. A blue Save button is at the bottom left. Yellow circles with numbers 2, 3, 4, and 5 are placed next to the Document Type, Document Sub Type, File * field, and Save button respectively.

6 Case Notes

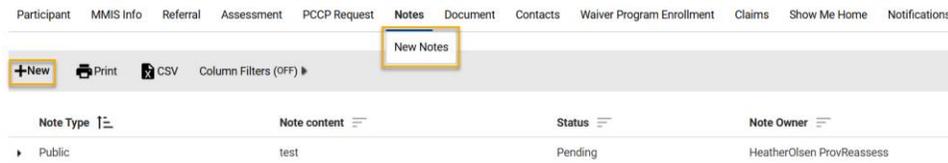
ABOUT THIS SECTION

This section describes how to access and add case notes.

6.1 ADDING CASE NOTES

❖ To add a Case Note:

Step 1: Navigate to the **Participant > Notes** tab. Click the **+New** icon or hover over Notes to highlight and click **New Note**.



Step 2: Select a **Status** from the dropdown menu.

Step 3: **Note Content** allows for free type text.

Step 4: Enter the **Date of Contact**.

Step 5: Click **Save**.

Participant Referral Assessment PCCP Request **Notes** Document Contacts

Status * Pending 2

Note content * 3

Note Owner

Date of Contact * 4 (mm/dd/yyyy)

Save 5

7 Provider Reassessments

ABOUT THIS SECTION

This section describes how to process assessments.

7.1 NAVIGATING TO ASSESSMENTS

There are various ways to navigate to a pending assessment.

7.1.1 Navigating to My Agency's Reassessments Queue

Reassessments assigned to your agency will appear here.

❖ To navigate to your agency's reassessments:

Step 1: From the home screen dashboard, navigate to **My Dashboard** and select **My Agency Reassessments** from the dropdown.

Note that there are filters under each column in the queue to view a group of intended assessments for a specific assessor, for example.

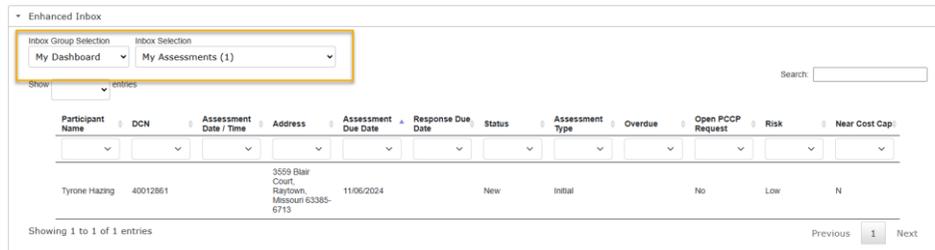
The screenshot shows the 'Enhanced Inbox' interface. At the top, there are navigation links for 'Home' and 'Home'. Below that is a 'Quick Links' section with a 'Participant Search' button. The main area is titled 'Enhanced Inbox' and contains several filters: 'Inbox Group Selection' (set to 'My Dashboard'), 'Inbox Selection' (set to 'My Agency Reassessments (2)'), and 'Inbox Actions' (set to '--Select--'). There is also a 'Show' dropdown set to 'entries' and a 'Search' input field. Below the filters is a table with columns: 'Participant Name', 'DCN', 'Provider Reassessor Due Date', 'Assigned Assessor', 'Assigned Agency', 'County', 'Zip Code', 'Status', and 'Open PCCP Request'. The table contains one row of data: Mitchell Hazing, 72062248, 01/31/2025, (Unassigned), Costa Vida, Carroll, 64501-4729, New, Yes.

Participant Name	DCN	Provider Reassessor Due Date	Assigned Assessor	Assigned Agency	County	Zip Code	Status	Open PCCP Request
Mitchell Hazing	72062248	01/31/2025	(Unassigned)	Costa Vida	Carroll	64501-4729	New	Yes

7.1.2 Navigating to My Reassessments Queue

❖ To navigate to your reassessments:

Step 1: From the home screen dashboard, navigate to the **My Dashboard > My Reassessments** queue:

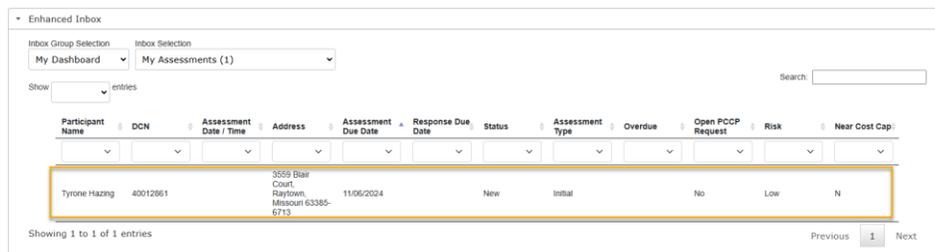


The screenshot shows the 'Enhanced Inbox' interface. At the top, there are two dropdown menus: 'Inbox Group Selection' set to 'My Dashboard' and 'Inbox Selection' set to 'My Assessments (1)'. Below these is a search bar and a 'Show' dropdown set to 'entries'. The main area contains a table with the following data:

Participant Name	DCN	Assessment Date / Time	Address	Assessment Due Date	Response Due Date	Status	Assessment Type	Overdue	Open PCCP Request	Risk	Near Cost Cap
Tyrone Hazing	40012861		3559 Blair Court, Raytown, Missouri 63385-6713	11/06/2024		New	Initial		No	Low	N

At the bottom, it says 'Showing 1 to 1 of 1 entries' and has 'Previous' and 'Next' navigation buttons.

Step 2: Click the assessment record in the queue:

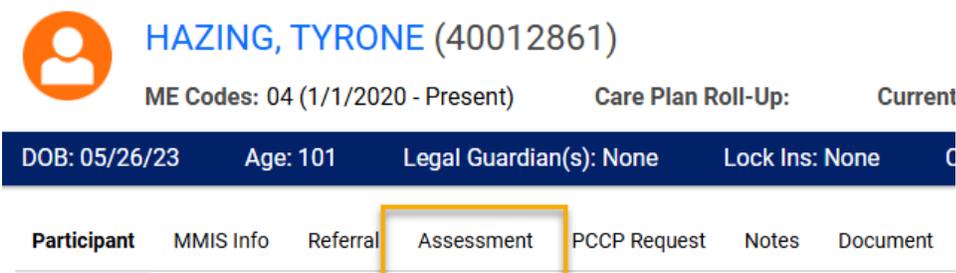


This screenshot is identical to the previous one, but the single row in the table is highlighted with a yellow border, indicating it has been selected.

7.1.3 Navigating to an Assessment from a participant record

❖ To navigate to an assessment from a participant record:

Step 1: Click the **Assessment** tab from the participant navigation bar:



The screenshot shows a participant record for 'HAZING, TYRONE (40012861)'. Below the name, it says 'ME Codes: 04 (1/1/2020 - Present)' and 'Care Plan Roll-Up: Current'. A dark blue bar contains the following information: 'DOB: 05/26/23', 'Age: 101', 'Legal Guardian(s): None', and 'Lock Ins: None'. At the bottom, there is a navigation bar with tabs: 'Participant', 'MMIS Info', 'Referral', 'Assessment', 'PCCP Request', 'Notes', and 'Document'. The 'Assessment' tab is highlighted with a yellow border.

Step 2: Click the related **assessment record** you want to view:

 **HAZING, TYRONE (40012861)**
ME Codes: 04 (1/1/2020 - Present) Care Plan Roll-Up: Current Care Plan:

DOB: 05/26/23 Age: 101 Legal Guardian(s): None Lock Ins: None Case Notes: [New](#)

Participant MMIS Info Referral **Assessment** PCCP Request Notes Document Contacts Waiver Program Enrollment Claims Show Me Home Notifications Activity Log As

New MMIS Info

 Print  CSV Column Filters (OFF) ▶

Status	Assessment Finalized	Assigned Assessor	Assigned Supervisor	Assessment Due Date	Assessment Date	Assessment Time	LOC Met	Reassessment Group	Adverse Action Deadline	Risk	Unable Complete Reason
New		Brendon Barnett	Ankur Dhawan	11/06/2024						Low	

7.2 ASSIGN AN ASSESSMENT

Assessments can be individually assigned to a specific assessor, or multiple assessments can be assigned to an assessor using the bulk assign option.

7.2.1 Assign Individual Assessment

❖ To individually assign an assessment:

Step 1: Navigate to **My Dashboard>My Agency Reassessments**.

Step 2: Click on the desired row to select the participant.

The screenshot shows the 'Enhanced Inbox' interface. At the top, there are dropdowns for 'Inbox Group Selection' (set to 'My Dashboard') and 'Inbox Selection' (set to 'My Agency Reassessments (2)'). Below these is a search bar and a table of assessment entries. The table has columns for Participant Name, DCN, Provider Reassessor Due Date, Assigned Assessor, Assigned Agency, County, Zip Code, Status, and Open PCCP Request. The first row is highlighted with a yellow box and a '2' in a circle, indicating it is the selected participant.

Participant Name	DCN	Provider Reassessor Due Date	Assigned Assessor	Assigned Agency	County	Zip Code	Status	Open PCCP Request
Mitchell Hazing	72062248	01/31/2025	(Unassigned)	Costa Vida	Carroll	64501-4729	New	Yes

Step 3: The Assessment screen launches. Select an assessor from the **Assigned To** dropdown menu.

Assessment Information

Status New

[Download Assessment Package](#)

[View Originating Care Plan](#)

Assessment Type * Reassessment

Assigned Agency * Costa Vida - 1110987651

Assigned To *

Provider Reassessor Contact

Step 4: Click **Save**.

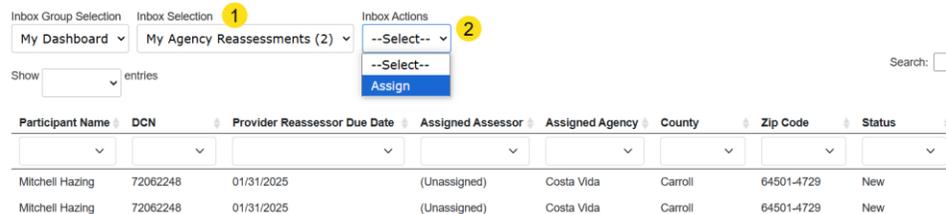
7.2.2 Bulk Assignments

When there are multiple assessments that need to be assigned to one or more assessors, they can be assigned in bulk rather than individually.

❖ **To Bulk assign multiple assessments to a specific assessor:**

Step 1: Navigate to **My Dashboard>My Agency Reassessments..**

Step 2: Click on the Inbox Actions dropdown to select **Assign**

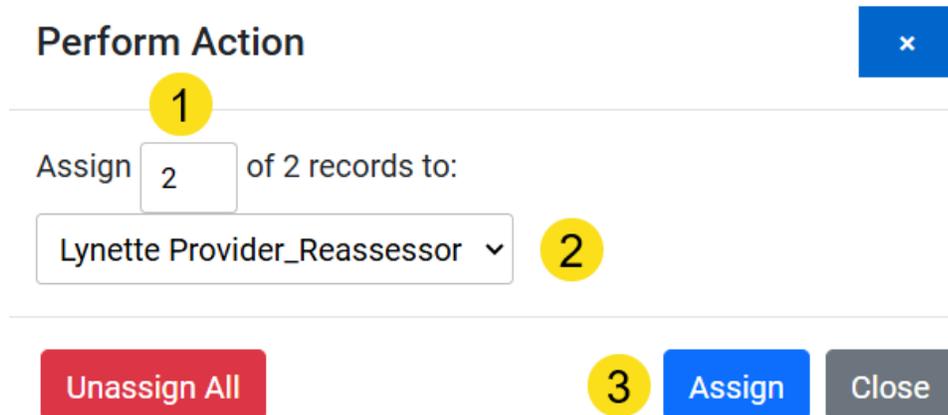


The screenshot shows the 'My Agency Reassessments' page. At the top, there are three dropdown menus: 'Inbox Group Selection' (My Dashboard), 'Inbox Selection' (My Agency Reassessments (2)), and 'Inbox Actions' (Assign). A search bar is on the right. Below the dropdowns is a table with columns: Participant Name, DCN, Provider Reassessor Due Date, Assigned Assessor, Assigned Agency, County, Zip Code, and Status. The table contains two rows of data for 'Mitchell Hazing' with DCN '72062248' and due date '01/31/2025', both assigned to '(Unassigned)' at 'Costa Vida' in 'Carroll' county with zip code '64501-4729' and status 'New'.

Step 3: Within the Perform Action window, accept the default or change the number of records to assign.

Step 4: Select the assessor from the dropdown.

Step 5: Click the **Assign** button.



The 'Perform Action' dialog box is shown. It has a title bar with a close button (X). Below the title bar, there is a label 'Assign' followed by a text input field containing '2' and the text 'of 2 records to:'. Below this is a dropdown menu showing 'Lynette Provider_Reassessor'. At the bottom, there are three buttons: 'Unassign All' (red), 'Assign' (blue), and 'Close' (grey).

7.3 SCHEDULE AN ASSESSMENT

Once a participant has agreed to have an assessment, you can schedule the assessment in FUSION.

❖ To schedule an assessment:

- Step 1:** Navigate to the **Assessment Information** section of the assessment screen.
- Step 2:** Select the **Assessment Date** and **Assessment Time** for the scheduled assessment:

The screenshot shows the 'Assessment Information' section of the FUSION interface. It contains several fields and links:

- Status:** Ready for Scheduling
- Assessment Due Date:** 11/06/2024 (mm/dd/yyyy)
- Assessment Date:** 10/31/2024 (mm/dd/yyyy) - This field is highlighted with a yellow box.
- Assessment Time:** 12:00 PM - This field is also highlighted with a yellow box.
- Assessment Finalized:** (checkbox)
- Submitted by Assessor:** (text input)
- Completed By:** (text input)
- Reauthorization Date:** (text input)
- Closed Date:** (text input)
- Assessment Type:** Initial (dropdown)
- Assigned To:** Brendon Barnett (dropdown)
- Assigned Supervisor:** Ankur Dhawan (dropdown)
- Risk:** Low (dropdown)
- Assessment Form:** InterRAI Home Care (HC) (Official Use) (dropdown)
- Links:** [Download Assessment Package](#) and [View Related Referral Page](#)

- Step 3:** Navigate to the **Actions Menu** section of the assessment screen.
- Step 4:** From the **Action** field, select the **Schedule Assessment** option and click the **Save** button:

Actions Menu

Action

1

Schedule Assessment



Assessment Case Note

Reauthorized By

Provider Reassessor Type

Form Record Audit

2

Save

Delete

The system updates the assessment to the “Scheduled” status and generates a scheduled assessment letter on the participant’s documents.

7.4 CONDUCT AN ASSESSMENT

Once an assessment is scheduled, you can conduct the assessment and capture the assessment results in FUSION.

❖ To conduct an assessment:

Step 1: Navigate to the **Actions Menu** section of the assessment screen.

Step 2: From the **Action** menu, select the **Assessment Started** option and click the **Save** button:

The screenshot shows the 'Actions Menu' section of the assessment screen. It features a horizontal line above the 'Action' dropdown menu, which is currently set to 'Assessment Started'. A yellow circle with the number '1' is positioned over the dropdown. Below this, another horizontal line separates the 'Form Record Audit' section, which contains two blue buttons: 'Save' and 'Delete'. A yellow circle with the number '2' is positioned over the 'Save' button.

The system will update the assessment to the “In Progress” status and make the InterRAI assessment form available.

Step 3: Navigate to the **Assessment Information** section of the assessment screen and click the **Launch Assessment** button:

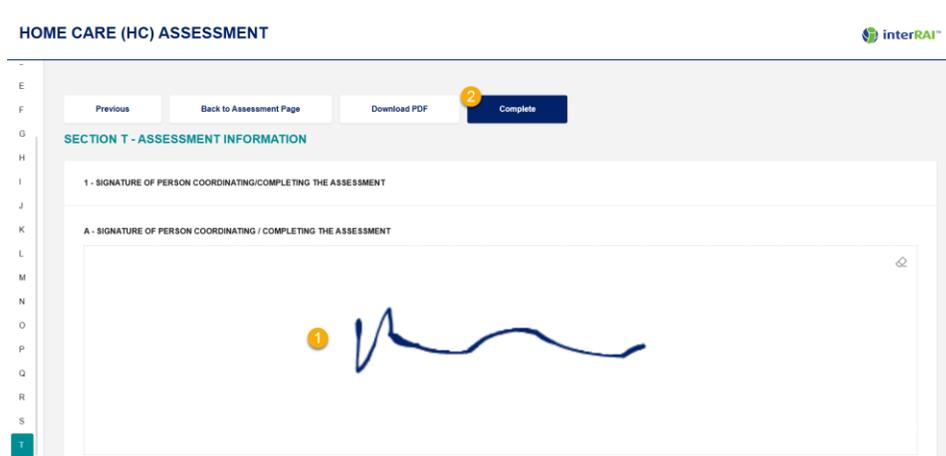
Assessment Type *	Initial
Assigned To *	Rani Vyas
Assigned Supervisor *	Brendon Barnett
Risk *	High
Assessment Form	InterRAI Home Care (HC) (Official Use)

Launch Assessment

The system will launch the InterRAI assessment form.

Step 4: Complete the InterRAI assessment form.

Step 5: In **Section T** of the form, add your **signature** and click the **Complete** button:



The system will navigate the user back to the FUSION assessment screen.

Step 6: In the **Actions Menu** section of the assessment screen, in the **Action** field, select the **Assessment Completed** option and click the **Save** button:

Actions Menu

Action 1 Assessment Completed ▼

2 Save Delete

The system will update the assessment to the “Calculated” status and calculate the Level of Care (LOC) score:

Status Calculated

[Download Assessment Package](#)

[View Related Referral Page](#)

Assessment Type * Initial ▼

Assigned To * Rani Vyas ▼

Assigned Supervisor * Brendon Barnett ▼

Risk * High ▼

Assessment Form InterRAI Home Care (HC) (Official Use)

Launch Assessment View LOC Score

LOC & Response Deadlines

LOC Met	Yes
Final LOC Score	18

7.5 RECALCULATE AN ASSESSMENT

If you need to update the InterRAI assessment form and recalculate the Level of Care (LOC) score, you can recalculate the assessment.

❖ To recalculate an assessment:

Step 1: Navigate to the **Assessment Information** section of the assessment screen and click the **Launch Assessment** button:

Assessment Type *	Initial
Assigned To *	Rani Vyas
Assigned Supervisor *	Brendon Barnett
Risk *	High
Assessment Form	InterRAI Home Care (HC) (Official Use)

Launch Assessment

The system will launch the InterRAI assessment form.

Step 2: Update the InterRAI assessment form.

Step 3: In **Section T** of the form click the **Complete** button:

HOME CARE (HC) ASSESSMENT

interRAI

Previous Back to Assessment Page Download PDF **2 Complete**

SECTION T - ASSESSMENT INFORMATION

1 - SIGNATURE OF PERSON COORDINATING/COMPLETING THE ASSESSMENT

A - SIGNATURE OF PERSON COORDINATING / COMPLETING THE ASSESSMENT

1

The system will navigate the user back to the FUSION

assessment screen.

Step 4: In the **Actions Menu** section of the assessment screen, in the Action field, select the **Recalculate Assessment** option and click the **Save** button:

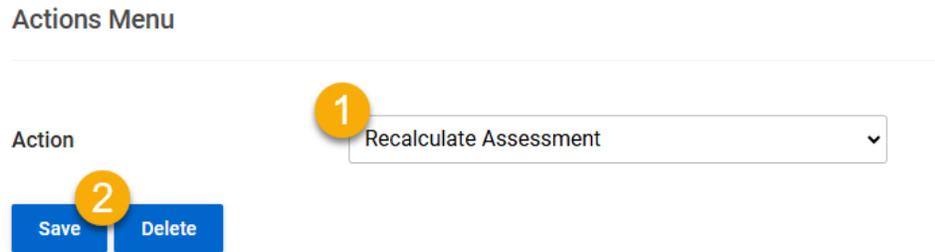
Actions Menu

Action 1

Recalculate Assessment ▼

2

Save Delete

The image shows a screenshot of the 'Actions Menu' section. At the top, the text 'Actions Menu' is displayed. Below it is a horizontal line. Underneath the line, the word 'Action' is followed by a dropdown menu. The dropdown menu is open, showing the option 'Recalculate Assessment' with a downward arrow. A yellow circle with the number '1' is positioned above the dropdown menu. Below the dropdown menu, there are two blue buttons: 'Save' and 'Delete'. A yellow circle with the number '2' is positioned above the 'Save' button.

The system will recalculate the Level of Care (LOC) score.

7.6 PROVIDER REASSESSOR SUBMITS ASSESSMENT FOR LOC NOT MET

As a Provider Reassessor user, you can submit an assessment that does not meet Level of Care (LOC) for review by DSDS staff.

To submit an assessment:

- Step 1:** Navigate to the **Actions Menu** section of the assessment form. In the **Action** field, select the **Submit Assessment (PR)** option.
- Step 2:** Add an **Assessment Case Note** stating participant did not meet LOC requirements.
- Step 3:** Click the **Save** button.

Actions Menu

The screenshot shows a form titled "Actions Menu" with three numbered steps:

- Action:** A dropdown menu with "Submit Assessment (PR)" selected.
- Assessment Case Note *:** A text area containing "Participant did not meet LOC requirements."
- Save:** A blue button.

The system will update the assessment to the “Provider Reassessment – LOC Not Met” status and is pending review by DSDS staff.

7.7 PROCESS ASSESSMENT AS UNABLE TO COMPLETE

If the provider reassessor is unable to complete the assessment

❖ To process an assessment as Unable to complete:

- Step 1:** Navigate to the **Actions Menu** section of the assessment screen.
- Step 2:** In the **Action** menu, select the **Unable to Complete** option from the dropdown.
- Step 3:** Select the **Unable to Complete Reason** from the dropdown that appears.
- Step 4:** Click **Save**.

Actions Menu 1

Action: Unable to Complete 2

Unable to Complete Reason * 3

Assessment Case Note

Reauthorized By

Provider Reassessor Type

AFO Care Plan Data

Save 4

- Admitted to Hospital
- Admitted to Rehabilitation Facility
- Admitted to Skilled Nursing Facility
- Deadline Missed
- Deceased
- Inactive Medicaid/ME Code 05 (Managed Care)
- Incarcerated
- Moved Out of Service Area
- Moved Out of State
- No Show
- Refusal of Assessment
- Requested Services to be Closed
- Safe at Home Program Participant
- Scheduling Conflict

At that time the system will notify PRR that the assessment is ready for further action on the DSDS side. The assessment will drop off the My Reassessments queue once the PRR team has finished processing.