

Participant Screen

- Address and phone number are up to date
- Marital Status / Living Arrangement match InterRAI and case notes
- COOP Priority is updated
- Shared Household updated if needed
- Safety and Special Accommodations updated if needed

Contact Tab

- Name of phone number of the primary family or friend caregiver(s), paid or unpaid
- Name and phone number for providers outside of HCBS (e.g. home health, hospice, therapy services, specialty care, mental health, etc.).
- Name and phone number for key individuals involved in the care planning process
- Name and phone number for the participant's primary care physician (PCP)

Care Plan

- There is a need identified in the InterRAI and/or case notes for ALL tasks authorized
- Recent utilization was reviewed for reassessment
 - If low, care plan was adjusted or explanation was documented in case notes
- Within cost and unit maximums
- For agency model, dietary and meals/dishes are authorized appropriately
- GHEs are authorized for the appropriate months
 - If the participant receives regular nurse visits, GHEs are authorized with the nurse visit task, not as separate tasks
- State plan is exhausted before comparable waiver services are authorized
- Cleaning time for shared spaces is not authorized unless an explanation is provided in the case notes
- Meal prep/dietary/meals and dishes are not authorized if the participant has access to shared meals, unless an explanation is provided in case notes

Case Notes

- Description of the need and how diagnoses affect the participant's ability to function
- Vital information:
 - Example: living conditions, home size and spaces, informal supports, individuals living in the home with the participant
- Used approved abbreviations only
- Descriptions of tasks that require further elaboration such as treatments, clean/maintain equipment or authorizations outside of the norm that would be questioned without further explanation

If CDS

- Ability to self direct is confirmed in case notes
- Self-direction tools are utilized if needed and uploaded

Forms

Face-to-Face Assessment:

- Forms are fully completed and uploaded into Documents under the correct document types

Hybrid Assessment (in very rare situations **with** prior approval by PRR):

- Documentation includes a list of the forms discussed (including rights and responsibilities, acknowledgment of understanding and consent to a verbal signature).