



Provider Reassessor Quick Guide Checklist

Participant Case Summary Screen

- Address and phone number are up to date
- Living arrangements match InterRAI and case notes
- Physician Information is entered and up to date
- Other Responsible Party is entered and up to date
- If the participant has a legal guardian, paperwork is uploaded

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 per [INFO 09-20-01](#)
- GHEs are authorized for the appropriate months
 - If the participant receives regular nurse visits, GHEs are included in the service delivery comment section, not authorized in a separate line
- 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 questions without further explanation

Forms

If by phone:

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

If in person:

- Forms are fully completed and uploaded into attachments under the correct headers

If CDS

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