

**Choices for Care**  
**Initial (first) Independent Living Assessment Health Information**  
**Procedures October 29, 2009**

The DAIL Long-Term Care Clinical Coordinators (LTCCC) complete an assessment of Choices for Care applicants for the purpose of CFC clinical eligibility. The LTCCC assessment includes cognitive, behavioral, functional and health information that is the same as the information assessed on the Independent Living Assessment (ILA).

Eligible individuals in the home-based setting of CFC have a case manager either through the Area Agency on Aging or Home Health Agency. After a CFC applicant is determined to meet clinical eligibility, the LTCCC sends (or notifies for OMNIA use) the assessment and clinical certification to the chosen case management agency who assigns a case manager. The case manager in turn meets with the CFC applicant, completes an Independent Living Assessment (ILA) Personal Care Worksheet and CFC service plan.

The ILA Health section requirement is for a Registered Nurse (RN) or Licensed Practical Nurse (LPN) to complete and sign. In order to expedite consumer access to services and to increase efficiencies the DAIL LTCCCs clinical eligibility assessment information may be used to meet the ILA Health Section requirement for the first ILA.

The new process for the completion of the initial ILA for CFC home-based consumers is as follows:

**Agencies Utilizing SAMS/OMNIA for the ILA/Personal Care Worksheet**

- The case management agency creates the initial ILA by “reassessing” from the LTCCC Clinical Assessment in OMNIA. By clicking “reassess, all information from the LTCCC assessment will copy to the ILA for assessment where the assessment question is the same (such as cognitive skills for daily decision making, the ADL functional assessment self performance, health questions).
- The case manager reviews the assessment information prior to the visit with the consumer.
- At the visit with the consumer, the case manager completes the ILA. The case manager must review the information copied from the LTCCC assessment with the client and make referrals as appropriate.
- The case manager needs to acquire the ICD-9 code for the service plan.
- The case manager completes the personal care worksheet at the end of the ILA.
- The case manager imports the completed ILA assessment (with attached personal care worksheet) to the DAIL database in OMNIA on agingnetwork.
- The case manager completes a CFC service plan with the consumer and mails the request to the LTCCC for utilization review.
- Case Manager mails other documentation not in OMNIA such as the Employer Agent Certification form with the Service Plan as applicable.

- The LTCCC upon receiving the service plan completes utilization review from the ILA & personal care worksheet in agingnetwork.
- If the LTCCC does not approve the time requested they will complete a LTCCC UR form in SAMS.
- The case manager reviews that LTCCC UR form and ensures that the personal care provider receives a copy.

### **Agencies using paper ILA**

- The case manager reviews the assessment information prior to the visit with the consumer.
- At the visit with the consumer, the case manager completes the ILA. The case manager must review the information copied from the LTCCC assessment with the client and make referrals as appropriate. Cognitive, ADL , IADL and incontinence information must be on the case manager's ILA.
- The case manager needs to acquire the ICD-9 code for the service plan.
- The case manager completes a service plan and personal care worksheet with the consumer and mails with the ILA to the LTCCC for utilization review.
- The LTCCC completes utilization review from the paper ILA, personal care worksheet and service plan.
- If the LTCCC does not approve the time requested they will complete a LTCCC UR form in SAMS.
- The LTCCC sends of copy of the revised personal care worksheet to the case manager (only to providers who are not using OMNIA)

### **Other**

- If a home health agency is already providing services to the consumer or will be through either homecare or Choices for Care and it makes sense they may complete the health section for the initial ILA as long as scheduling does not delay the application process.

### **Reassessment**

- The case manager must work with a RN/LPN and have them complete the health section for all ILA annual **reassessments or any changes that are located in the health section and need to be updated.**