

HCBS Habilitation LOCUS/CALOCUS Process
for
Iowa Medicaid and the Managed Care Plans (MCOs)

Initial Needs Based Eligibility

1. Health Home will complete the Comprehensive Assessment and Social History (CASH) with the member and legal representative, if applicable, and other persons the member has requested to attend.
2. Health Home will have member sign the CASH.
3. Health Home will complete the progress note in their system regarding completing the CASH.
4. Health Home will submit CASH and any supplemental documentation to the Managed Care Organization (MCO) / Iowa Medicaid accordingly.

a. Amerigroup (AGP)

- i. Health Home will submit CASH and any supplemental documentation via Availity / Interactive Care Reviewer or by fax, requesting a 99490 U1 authorization.
- ii. AGP will review the documentation and complete LOCUS / CALOCUS.
- iii. AGP will submit all documentation to Iowa Medicaid for eligibility determination.
- iv. Iowa Medicaid QIO will review documentation submitted for eligibility determination and the score of LOCUS / CALOCUS.
- v. Iowa Medicaid QIO enters the eligibility decision into IoWANS.
 1. If member does not meet habilitation eligibility, AGP will complete the interRAI CMH and submit to Iowa Medicaid QIO for further review.
- vi. AGP will notify the Health Home via fax / letter of approval including 99490 U1 Continued Stay Review (CSR) approval dates.
- vii. Health Home will go to Iowa Medicaid Portal Access (IMPA) documents tab to obtain a copy of the LOCUS / CALOCUS assessment results.

b. Iowa Total Care (ITC)

- i. Health Home will submit CASH and any supplemental documentation via uploading to the CLIENT Portal (Envolve)
 1. Select documents tab
 2. Upload
 3. Document Category: Long Term Services and Supports
 4. Document Type: 701B
 5. Upload File: select file
 6. Click Submit

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The screenshot shows a web form titled "Document Upload". It has a blue header bar with the title and a close button. Below the header, there are four numbered steps: 1. Document Category: Long Term Services & Supports (dropdown menu); 2. Document Type: 701B (dropdown menu); 3. Upload File: Choose File button, No file chosen; 4. Submit button.

- ii. ITC will review documentation and complete LOCUS / CALOCUS.
 - iii. ITC will submit documentation to IME for eligibility determination.
 - iv. Iowa Medicaid QIO will review documentation submitted for eligibility determination and the score of LOCUS / CALOCUS.
 - v. Iowa Medicaid QIO enters the eligibility decision into IoWANS.
 - 1. If member does not meet habilitation eligibility, ITC will complete the interRAI CMH and submit to Iowa Medicaid QIO for further review.
 - vi. ITC will notify the Health Home via email of approval of Continued Stay Review (CSR) approval dates.
 - vii. Health Home will go to IMPA documents tab to obtain a copy of the LOCUS / CALOCUS assessment results.
 - viii. ITC will complete the 99490 U1 authorization upon approval notification from Iowa Medicaid, if Health Home has already submitted enrollment. If no enrollment has been received, ITC will request enrollment be submitted.
 - ix. Health Home will obtain copy of authorization via Client Portal. Please note the authorization end date is NOT the end date for the CSR. The email from ITC with CSR dates is your end date.
- c. Molina Healthcare Inc.**
- i. Health Home will submit initial CASH as supporting documentation with IHH Notification Form requesting Tier 7/8.
 - ii. Molina will review documentation submitted and send communication to submitter to confirm receipt and provide next steps (ex additional information required, CM and IHH specialist contact information).
 - iii. Molina will refer to assessment team to complete LOCUS/CALOCUS.
 - iv. Molina will communicate with the state via IMPA to provide LOCUS/CALOCUS and receive eligibility determination.

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- v. Molina will communicate with IHH Notification Form submitter regarding results of eligibility and next steps.

Annual Renewal of LOCUS / CALOCUS

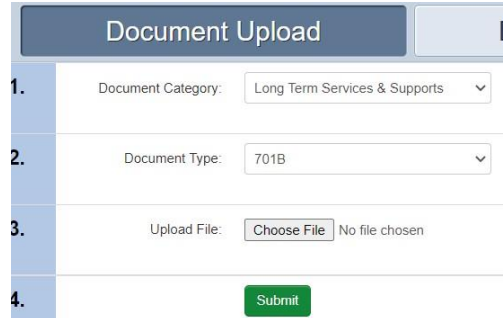
1. Health Home will schedule a meeting with the member and legal representative, and others member has identified to complete the CASH prior to the CSR expiration date, but no later than 14 days prior to CSR end date.
 - a. MCO / Iowa Medicaid strongly encourages that the CASH be scheduled and completed at least 45 – 65 days prior to CSR end date, to allow enough time for the health home to finalize the CASH and allow MCO enough time to process and submit to Iowa Medicaid for review, if needed.
2. Health Home will have member sign the CASH.
3. Health Home will complete the progress note in their system regarding completing the CASH.
4. Health Home will submit CASH and any supplemental documentation to the MCO / Iowa Medicaid accordingly.
 - a. Amerigroup
 - i. Health Home will submit CASH along with any supplemental documentation via Availity / Interactive Care Reviewer or by fax, requesting a 99490 U1 authorization.
 - ii. AGP will review for determination and complete LOCUS / CALOCUS.
 1. If member does not meet habilitation eligibility, AGP will complete the interRAI CMH and submit the CASH, interRAI, and any supplemental documentation to Iowa Medicaid QIO for eligibility determination.
 - iii. AGP will notify the Health Home via fax / letter of the 99490 U1 Continued Stay Review (CSR) approval dates.
 - iv. AGP will upload the LOCUS / CALOCUS to IMPA.
 - v. Health Home will go to IMPA documents tab to obtain a copy of the LOCUS / CALOCUS assessment results.

b. Iowa Total Care (ITC)

- i. Health Home will submit CASH along with any supplemental documentation via uploading to the CLIENT Portal (Envolve)
 1. Select documents tab
 2. Upload
 3. Document Category: Long Term Services and Supports
 4. Document Type: 701B

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5. Upload File: select file
6. Click Submit



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- ii. ITC will review the documentation and complete the LOCUS / CALOCUS.
 1. If member does not meet habilitation eligibility, ITC will complete the interRAI CMH and submit the CASH, interRAI, and any supplemental documentation to Iowa Medicaid QIO for eligibility determination.
- iii. ITC will notify the Health Home via email of Continued Stay Review (CSR) approval dates.
- iv. ITC will upload the LOCUS / CALOCUS to IMPA.
- v. Health Home will go to IMPA documents tab to obtain a copy of the LOCUS / CALOCUS assessment results.
- vi. ITC will notify utilization management of renewal for continued authorization for 99490 U1.
- vii. Health Home will obtain copy of authorization via CLIENT Portal. Please note the authorization end date is NOT the end date for the CSR. The email from ITC with CSR dates is your end date.

c. Molina Healthcare Inc.

- i. Health Home will submit annual renewal or status change CASH either as upload to member page in provider portal or via fax.
 1. IHH CM send email notification to Molina CM contact and cc general IHH inbox to communicate the updated CASH has been submitted.
 - a. Molina will review documentation submitted and send communication to submitter to confirm receipt and provide next steps (ex. additional information required).
- ii. Molina will refer to assessment team to complete LOCUS/CALOCUS.

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- a. If outcome results in change to previous LOCUS/CALOCUS score, Molina will collaborate with IHH CM to confirm understanding of impacts of the change.
- iii. Molina will communicate with the state via IMPA to provide LOCUS/CALOCUS data and receive eligibility determination.
- iv. Molina will communicate with IHH CM regarding confirmed eligibility.

Change in Member's Needs (needs higher tier than what is currently approved)

Note: If change in member's need is approved, this will **NOT** change the continued stay review (CSR) dates. The annual/initial dates will remain in place.

1. Health Home, member, and team determines that member may need a higher home-based habilitation tier than what is currently noted on the LOCUS / CALOCUS assessment.
2. Health Home will meet with member and legal representative, if applicable, and others the member has identified to attend and update the CASH, noting "type of assessment" on the CASH is "change in status update."
3. Health Home will have member sign the CASH.
4. Health Home will complete the progress note in their system regarding completion of the CASH.

Health Home will submit to MCO / Iowa Medicaid accordingly

a. Amerigroup

- i. Health Home will submit CASH along with additional supporting documentation, as applicable, for reconsideration for HBH tier via Availity / Interactive Care Reviewer or by fax, clearly indicating it is a change in tier request.
- ii. AGP will review information submitted and complete LOCUS / CALOCUS.
- iii. AGP will upload the LOCUS / CALOCUS to IMPA.
- iv. AGP will notify the Health Home via fax / letter of updated LOCUS / CALOCUS has been completed. *(Note CSR Dates will not change from annual/initial assessment dates)*
- v. Health Home will access IMPA documents tab to obtain a copy of the LOCUS / CALOCUS results.
- vi. Health Home will complete PCSP, if HBH tier changed per needs assessment, with team.

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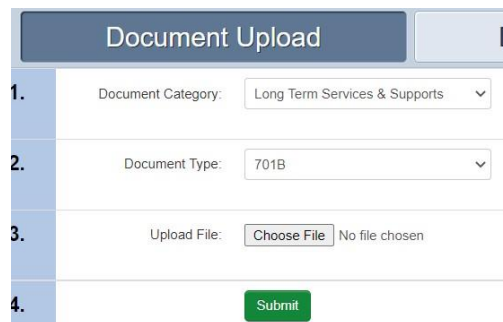
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- vii. Health Home will request HBH authorization via Availity / Interactive Care Reviewer or by fax, clearly indicating it is a change in tier request.
- viii. AGP will notify the Health Home via fax / letter of the updated authorization as applicable.

b. Iowa Total Care (ITC)

- i. Health Home will submit CASH along with additional supporting documentation, as applicable, for reconsideration for HBH tier via uploading to CLIENT portal (Envolve).
 - 1. Select documents tab
 - 2. Upload
 - 3. Document Category: Long Term Services and Supports
 - 4. Document Type: 701B
 - 5. Upload File: select file
 - 6. Click Submit



The screenshot shows a web form titled "Document Upload" with a close button in the top right corner. The form is divided into four numbered sections:

- 1. Document Category: Long Term Services & Supports (dropdown menu)
- 2. Document Type: 701B (dropdown menu)
- 3. Upload File: Choose File (button) No file chosen
- 4. Submit (button)

- ii. ITC will review information submitted and complete new LOCUS / CALOCUS.
- iii. ITC will upload the LOCUS / CALOCUS to IMPA.
- iv. ITC will notify the Health Home via email that updated LOCUS / CALOCUS has been completed. (*Note CSR Dates will not change from annual/initial assessment dates*)
- v. Health Home will access IMPA documents tab to obtain a copy of the LOCUS / CALOCUS results.
- vi. Health Home will complete PCSP, if HBH tier changed per needs assessment, with the team.
- vii. Health Home will upload the PCSP addendum via CLIENT portal (Envolve) for processing.
- viii. Health Home will locate authorization via CLIENT portal.

c. Molina Healthcare Inc.

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- i. Health Home will submit updated CASH either as upload to member page in provider portal or via fax to 833-616-4714.
 - a. IHH CM send email notification to Molina CM contact and cc general IHH inbox to communicate the updated CASH has been submitted.
- ii. Molina will review documentation submitted and send communication to submitter to confirm receipt and provide next steps (ex additional information required).
- iii. Molina will refer to assessment team to complete LOCUS/CALOCUS.
 - a. Once outcome results are received, Molina will collaborate with IHH CM to confirm understanding of impacts of the outcome.
- iv. Molina will communicate with the state via IMPA to provide LOCUS/CALOCUS data and receive eligibility determination.
- v. Molina will communicate with IHH CM regarding confirmed eligibility. *There will be no changes to IHH PMPM payment (99490), but new PCSP will be anticipated as appropriate to changes to LOCUS/CALOCUS and therefore changes to service level authorizations may occur.*

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Fee-For-Service Initial Habilitation Eligibility Determinations and Annual Redetermination (Continued Stay Review)

Training and guidance are available on the Integrated Health Home Webpage at:
<https://hhs.iowa.gov/ime/providers/integrated-health-home>

1. Health Home/TCM will add the Habilitation Program in IoWANS for the individual initially applying for Habilitation. For annual re-determination of needs-based eligibility the Health Home will receive a milestone in IoWANS to complete and submit the assessment (CASH).
2. Health Home/TCM will submit CASH along with any supplemental documentation via the IMPA system. The information needs to be uploaded under the CSA tab.
 - a. Login to IMPA. When you login for the first time, you will be required to answer three security questions before proceeding.
 - b. Under the main menu, click on Manage>My Account.
 - c. From the menu on the left, click on the “External Application Authorization” link.
 - d. Enter your IoWANS username and password.
 - e. Click on Save.
 - f. To refresh the File menu item, click on Manage>My Account. NOTE: Any link that refreshes the page will also work.
 - g. Click on File>Upload File>CSA
 - h. From the dropdown menu, select “CASH (Comp. Assess & Social Hist.) or for LOCUS/CALOCUS – Select LOCUS/CALOCUS
 - i. Click on the “Select” link. Browse to the location of the file on your computer and select the file you want to upload. (If this step does not work, follow the instructions on the page to update your Adobe Flash player; then close and reopen your browser and log into IMPA again)
 - j. Click the “Upload” link to begin the upload.
 - k. If an expedited review is needed, send an email to the Iowa Medicaid Core Standardized Assessment (CSA) assessor @ assessments-iowa@telligen.com.
3. Determination process.
 - a. Iowa Medicaid Core Standardized Assessment (CSA) assessor will download the documents from IMPA. The CSA assessor will log into the LOCUS Online and complete the LOCUS/CALOCUS assessment tool using the CASH and supplemental documentation.
 - b. If documentation is insufficient, the CSA assessor reaches out to the Health Home/TCM to request additional information.

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- c. The CSA contractor uploads the completed LOCUS/CALOCUS scoring tool, CASH, and supporting documentation into IMPA the "Document to IME" tab.
 - d. The Iowa Medicaid QIO downloads the CASH, LOCUS/CALOCUS and supplemental information submitted, and reviews for eligibility.
 - e. The Iowa Medicaid QIO reviewer enters the eligibility determination into IoWANS.
 - i. If the LOCUS / CALOCUS would result in a denial, Iowa Medicaid QIO reviewer will notify the CSA Assessor to complete the interRAI.
 - f. If approved, the Health Home/TCM receives a milestone in IoWANS notifying them that Habilitation has been approved and to complete the service plan.
4. Notification of CSR dates
- a. The CSR dates are displayed on the program request line in IoWANS.
 - b. The Health Home/TCM receives a milestone in IoWANS 45 days prior to the CSR date.
 - c. Obtain a copy of the LOCUS / CALOCUS assessment results and place in the member record
 - i. Health Home logs into IMPA
 - ii. Hover over File then select Upload File
 - iii. Click on CSA
 - iv. Enter the member's state identification (ID) number and click on Search
 - v. Select the document type from the drop-down menu
 - vi. Click on View Documents
 - vii. Click on Select on the appropriate line within the grid
 - viii. Download the document

OR

- i. Health Home logs into IMPA
 - ii. Hover over File then select Member Lookup
 - iii. Enter the member's state identification (ID) number and click on Search
 - iv. Click on Documents Tab to view the LOCUS / CALOCUS assessment.
5. Once the member has been approved for Habilitation the IHH may enroll the member for 99490 U1 (for habilitation only) and for 99490 U2 (for habilitation and CMH).
- a. Log into IMPA, hover over File and select Health Home.

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- b. Enter the member's state identification (ID) number and click on Search, click select
- c. Click Update
- d. Enter the Date of the Assessment to determine Health Home eligibility, Tier, Reason, and related diagnosis code(s)
- e. The "reason" drop-down menu has the selections of:
 - i. Tier Change
 - ii. Assessment Date Change
 - iii. Assessment Date and Tier Change