CSA – Off Year Assessment (OYA)

Purpose:

To determine if there are changes in the Intellectual Disability (ID) waiver member's daily care and support needs as evidenced by changes in diagnosis, medication, or functional abilities.

Identification of Roles:

Case Manager (CM) – Participate in phone consultation with Assessor to complete an Off-Year Assessment for ID waiver members who have received a Supports Intensity Scale (SIS) assessment or InterRAI-ID/ChYMH-DD within the last three (3) years.

Assessor – A Core Standardized Assessment (CSA) Assessor is trained to complete and administer the required assessment tools. Schedule and complete Off Year Assessments (OYAs) within required timeframes.

Assessment Scheduler – Upload completed OYAs to Iowa Medicaid Portal Access (IMPA).

Manages scheduling through the JIRA Service Management platform (IA CSA Service Desk). Coordinates SMS-based appointment confirmations with members and case managers. Monitors and manage the callback system for scheduling inquiries. Utilizes digital scheduling platform for Case Manager coordination.

QA Specialist –Complete ongoing quality assurance, initiate any needed remediation, and any ongoing training.

Communications Triage Team – Manages and processes incoming assessment requests through centralized scheduling system. Uses the JIRA Service Management platform (IA CSA Service Desk) as the primary tracking system.

Performance Standards:

- Assessor will complete Off Year Assessments within fourteen (14) calendar days prior to the twelve-month anniversary of service.
- Assessor will conduct Off Year Assessments for ID waiver members who have had a SIS assessment or InterRAI-ID/ChYMH-DD within the last three (3) years.
- Assessor avoids completing assessments on individuals with whom they have a conflict of interest and are asked to identify these circumstances early and secure an alternate Assessor to complete the assessment.
- Assessment Scheduler will upload the completed assessment to IMPA within five (5) business days of the assessment date. Schedules full assessment, if deemed necessary.

Path of Business Procedure:

Step 1: Assessment Scheduler will review the IoWANS workload daily to retrieve referrals and to confirm the workload. Once the workload has been identified, the Assessment Scheduler will determine if an Off Year Assessment is needed for that member and will add the OYA to SAM, if applicable.

Assessment Scheduler will utilize the JIRA Service Management platform (IA CSA Service Desk) to track and manage OYA referrals and workload. All scheduling activities will be documented in this centralized system.

Step 2: An Assessment Scheduler will contact the CM to schedule a time to complete the OYA within the fourteen (14) days prior to the CSR (Continued Stay Review) date. The Assessor completes all data entry and uploads the assessment into SAM.

CMs will utilize the digital scheduling platform to coordinate with the Assessment Schedulers. SMS-based confirmations will be sent to CMs once appointments are scheduled.

Step 3: Managers or QA Specialist will review the completed assessments according to the Quality Assurance Plan. Upon completion of the quality review, the Assessment scheduler will upload the completed assessment to IMPA to allow access to the document by the CM. This will be completed within five (5) business days from the date the assessment was completed.

Step 4: After the OYA has been completed, Assessors will answer IoWANS milestones for completion of OYAs using the response Off-Year Phone Assessment and enter the date of completion in comments.

Step 5: The Assessor will decide if a full assessment is needed. If the member has had a significant change in at least three (3) of the five (5) domains that is **likely to continue**, the Assessor will complete a reason and rationale statement supporting the need for a full assessment. If unsure, the Assessor will discuss this with their manager.

Step 6: If an InterRAI-ID/ChYMH-DD is necessary, the Assessor will share this information with the CM or individual with whom contact was established.

The Assessor will also submit a request to the Assessment Scheduler. The assigned Assessment Scheduler will then follow standard scheduling and notification procedures to allow for completion of the InterRAI-ID/ChYMH-DD within 30 calendar days of the OYA.

Communication Systems and Channels

Staff will utilize the JIRA Service Management platform (IA CSA Service Desk) for:

- Managing assessment requests
- Tracking scheduling activities
- Documenting communication with Case Managers
- Recording completion status

Forms/Reports:
Off Year Assessment Form

RFP Reference:
1.3.1.2.D
1.3.2.C.2

Interfaces:
IoWANS
IMPA
SAM
JIRA
Talkdesk

Attachments:
N/A