Nursing Home Transition

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Agenda

- Introduction
- Billing
- Documentation
- DocuShare
- Resources
- Questions
- Appendices for informational purposes:
  - Errors
  - Reports
  - Special Nursing Home Transition Fund (SNHTF)
  - W16 Form
  - Summary

1/18/2017
Purpose of this presentation:
To cover the new billing process effective Dec. 1, 2016:

Two Billing Tracks:
1. Waiver eligible participants – transition services will be documented in SAMs and paid through W7337
2. Non-waiver eligible participants – transition services will be documented in SAMS and paid monthly in the same format currently paid

Three Main Changes:
1. NHT 01 – increased rates
2. NHT 02 – changed process
3. NHT 03, 04, and 05 – available for persons without care management through a waiver or program
The Billing Tracks

Waiver (PROMISe code W7337):
1. Independence
2. OBRA
3. CommCare
4. Aging
5. Attendant Care

Non-waiver (OLTL monthly billing process):
1. Living Independently For Elders (LIFE) Program
2. Act 150 Program
3. Options Program
4. Caregiver Support Program (CSP)
5. Individuals not receiving service coordination or care management through an OLTL or PDA program. This may include individuals receiving person centered counseling, Apprise counseling or individuals private paying for services due to income or assets.
6. Non-care managed programs, such as, only receiving a personal emergency response system (PERS) or home delivered meals (HDM)
Billing
Billing Transition

NHT care enrollments entered November 30th 2016 and prior will follow the previous NHT billing process.

NHT care enrollments entered December 1st forward will follow the new NHT billing process.

December 1st 2016
NHT 01 Transition Coordination may be entered in SAMS as a Service Delivery once it is determined that an individual
  • Meets the NHT participant definition
  • Agrees to transition

NHT 01 Transition Coordination rates are based on the Service Coordination regional rates
NHT Billing Structure - Overview

- NHT 01 Transition Coordination (billable at regional rate) NHT01 are based on quarter ¼ hr increments. Ex: 1 hr=4 units, 4 hrs =16 units, 8 hrs=32 units
  - Capped at 32 units per day unless justification is provided and approved
  - Capped at 240 total units unless an exception is granted for up to 480 units

- NHT02A-NHT Outreach Form=$250 payment

- NHT02B-NHT Post Transition Gap Coverage=$250
  - Billable within the first 30 days after transition in specific circumstances when formal services have not yet begun to prevent re-institutionalization (must be documented in SAMS journal notes)
  - Is contingent upon the completion of the NHT Outreach Form
Any OLTL or PDA Program that provides Service Coordination or Care Management may bill:

- NHT01-NHT02B
- Individual must meet the NHT participant definition
- All transition coordination activities are entered in SAMS as NHT 01 as part of the record, documenting time spent, units provided, and when the units of service were provided. This becomes part of the supporting documentation for services rendered.
- OLTL will run monthly reports for waiver eligible participants to include NHT01-NHT02B
  - These billed activities will be posted through DocuShare
  - Units are capped at 240 for all transitions, an exception for up to 480 may be requested
OLTL and PDA programs that provide Service Coordination or Care Management include:

- Aging
- OBRA
- COMMERCARE
- Independence
- Attendant Care
- ACT 150
- LIFE (not eligible for NHT02B)
- Caregiver Support Program (CSP)
- Options

NHT03, 04, 05 may not be billed for these programs as this is considered a duplication of service.
Payment for Transition Service Coordination (W7337) will occur when:

- Transition is indicated as completed through the NHT02A
- Transition is indicated as unsuccessful through the NHT02A
- Total length of transition exceeds 180 days

Any entered NHT01 activities will be reviewed by OLTL. Upon this review it will be determined which entered service deliveries will be paid monthly (NHT 01), or direction will be provided to the NHTCA to bill entered units under W7337 through the Waiver Individual Service Plan (ISP) and paid through PROMISe.

- For additional information regarding W7337 Transition Coordination Services please refer to MA Bulletin 59-16-09 Nursing Home Transition Program Changes.
These programs includes:

- Individuals who do not meet the NFCE level of care criteria – private pay individuals in a nursing facility
- Non-care managed programs, such as, only receiving a personal emergency response system (PERS) or home delivered meals (HDM)
- Individuals transitioning without any programmatic support or service from OLTL or PDA that involves Service Coordination or Care Management

Transition coordination activities are to be billed as NHT01 and will be paid monthly for services posted in SAMS.

- Billed activities will be posted through DocuShare
- Outcome payments (NHT03, 04,05) may be billed, and must be completed in person as part of a face to face visit
All transition coordination activities for individuals who will be transitioning into the LIFE program are billed monthly as NHT 01.

OLTL will run monthly reports for LIFE eligible participants
  • These billed activities will be posted through DocuShare

Participants receiving services through LIFE are **not** eligible to bill for NHT Post Transition Gap Coverage (NHT02B)

Participants receiving services through LIFE are **not** eligible for NHT03,04,05
In all cases regardless of the program or the waiver the individual is entering, payment will only occur when:

- A successfully entered Service Delivery is entered in SAMS. A successful Service Delivery must have:
  - Correct Provider name,
  - Whole units (no partial units), and
  - Completed daily unit details calendar.

- Payment for NHT02A must have a fully completed NHT Outreach Form. If the form is not completed in its entirety (based on skip patterns) this will appear on an error report.
All NHT01-05 activities are billed under the NHT Care Enrollment beginning December 1st.

This enrollment remains open until all activities and services related to NHT (including SNHTF) are entered into SAMS. This pertains to the new billing process and the existing billing process (NHT01-05).
Example: participant enrolled in NHT prior to Dec. 1, 2016

<table>
<thead>
<tr>
<th>OLD WAY</th>
<th>AFTER DEC. 1, 2016</th>
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<tbody>
<tr>
<td>NHT 01 MFP – NHT Care Enrollment</td>
<td>NHT 01 – NHT Care Enrollment</td>
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<tr>
<td>NHT 02 – NHT Care Enrollment</td>
<td>NHT 02A and B – NHT Care Enrollment</td>
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<td>NHT 03 – Aging Waiver Care Enrollment</td>
<td>NHT 03 – NHT Care Enrollment</td>
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<td>NHT 04 – Aging Waiver Care Enrollment</td>
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<td>NHT 05 – Aging Waiver Care Enrollment</td>
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## Services Entered into SAMS

### Transition

<table>
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<tr>
<th>Service Code</th>
<th>Service Description</th>
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<tr>
<td>NHT 01</td>
<td>MFP – NHT Care Enrollment</td>
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<tr>
<td>NHT 02</td>
<td>NHT Care Enrollment</td>
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<tr>
<td>NHT 03</td>
<td>Aging Waiver Care Enrollment</td>
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<tr>
<td>NHT 04</td>
<td>NHT Care Enrollment</td>
</tr>
<tr>
<td>NHT 05</td>
<td>NHT Care Enrollment</td>
</tr>
</tbody>
</table>

1/18/2017
You must enter service delivery details through the daily unit details calendar.

- We need to know the dates the services were actually delivered.
- Payments will not be made if entry is not completed using the daily unit details calendar.

The incorrect entries are identified and you have an opportunity to correctly re-enter through the daily unit details calendar.
Non Billable Services or Time

- NHT01 may not be billed during the time that a Waiver ISP is on hold for up to 180 days. It is the Service Coordination Entities responsibility to address the individual’s needs as this was taken into consideration when the Service Coordination rate (W1011) was developed. DHS website: http://www.dhs.pa.gov/provider/longtermcareprov/index.htm under “Billing” attachment B page 5 http://www.dhs.state.pa.us/cs/groups/webcontent/documents/bulletin_admin/p_033878.pdf

- Some of these tasks include:
  - Housing
  - Home Adaptations
  - Increase in services through the ISP process
  - Obtaining Specialized Medical Equipment (SME)
  - Addressing any other barrier that may arise that would prevent the individual from returning to the community and resuming Waiver services
  - Developing the ISP
Non Billable Services or Time

• NHT Coordination Agencies (NHTCAs) may not bill for the completion of a Care Management Instrument (CMI) for Waiver eligible participants. This is completed by the Independent Enrollment Broker (IEB).

• NHT01 may not be entered into SAMS for activities that occur after the date of transition.

• NHT01 may not be billed for data entry or travel time.

• Any activity that cannot be directly tied to or related to a specific individual (e.g. general meetings, conferences, etc).
Documentation
Documentation

- Proper documentation and record keeping requirements through SAMS journal notes is essential for NHT participants.

- Documentation is important to show a chronological historical record of the participants transitional activity.
We ask that you follow basic standard practices and document in the journal note area of SAMS the services you are providing and the decisions you are making regarding the participants you are working with.

Documentation should include what was done, by whom, why and what the results are.

When in doubt, it is always better to document!!!
We ask that you be especially diligent in documenting the following situations:

- Any and all transitions that are cancelled and the reasoning behind the cancellation.
- One participant having multiple transitions that fall within a 180 day period.
- When declining to assist with a transition, document the following:
  - Why,
  - What risks are unable to be mitigated,
  - Why the transition would not be safe, and/or
  - What barriers cannot be safely/adequately overcome to ensure a safe discharge.
• Document in-community contacts (NHT 03, 04, 05 contacts must be in-person face-to-face).

• Community Living Plan:
  o Document in the SAMS journal notes the “community living plan,” which should include but not be limited to needed waiver services, mental health or substance abuse counseling and services.
  o Include other Office of Long Term Living (OLTL), Office of Developmental Programs (ODP), Office of Mental Health and Substance Abuse Services (OMHSAS), or PA Department of Aging (PDA) programs, services or programs provided by Office of Income Maintenance (OIM) or charitable community organizations.
• Home Adaptations (NHTCA must have prior authorization and “front” monies for completion prior to transition).
  ❖ The Community Living Plan serves as a way to communicate with the selected Service Coordination agency (SCE) the specific community services the individual will need and which have been arranged. Please clearly state in the subject line of the SAMS journal note “Community Living Plan.”

• State when and why the units for NHT (240 units) are exceeded or when more than 32 units per day are billed in SAMS service delivery. When exceeding units, contact our office (ra-nht@pa.gov) to get approval ahead of time.

• Document contacts with the IEB and SCE.

• Document the NHT Care Plan Worksheet to identify any risks and how the risks are being addressed or mitigated.
Proper documentation of standards and practices ensures the accuracy and legitimacy that services are provided in accordance with NHT program requirements and procedures.
DocuShare
Information for NHT Providers
Separate groups were created for each provider.

Everyone has access to a General Information & Instruction folder.

New user / Remove user send email to:

- RA-pwoltldocushare@pa.gov
The report currently consists of four tabs and additional tabs may be added in the future to distinguish Waiver vs Non-Waiver participants.

The following are the current four tabs:

1) All payables entered and processed during the month (NHT Services MM/YYYY),
2) Errors not processed (Items to be Corrected),
3) Errors/exceptions reviewed by NHT staff with approval/disapproval (Errors), and
4) Summary.
Our internet environment is located at https://www.dpwds.state.pa.us/. The URL uses SSL so it must start with https:// and not http://.

You must use the user name (1) and password (2) provided to you by OLTL.

The domain is Managed (3).
After Signing in click on the OLTL folder.
Next click on NHT Payables folder.
Click on your agency folder. You should only be able to see your provider(s) folders and the General Instructions folder. Please notify OLTL via the RA mailbox (RA-PWOLTLDOCUSHARE@pa.gov) if you can see more or less.
Your report is here with designated month and year.

1/18/2017
The report is read-only.
Resources

- **OLTL NHT Staff**
  - NHTCA Related questions, concerns, technical assistance, and support
    - ra-nht@pa.gov
  - NHT Funding requests
    - ra-transitionfunding@pa.gov

- **NHT Hotline**
  - ra-PWNHTinfo@pa.gov
  - 1-800-833-5196

- **OLTL Finance**
  - Concerns related to W16 Form or to request an electronic copy of the W16 form:
    - ra-nh_assessments@pa.gov
  - Billing questions or concerns should be sent to:
    - ra-PWOLTLNHTBilling@pa.gov

- **OLTL Provider Enrollment**
  - 1-800-932-0939
  - ra-HCBSEnProv@pa.gov
Resources

- **DocuShare – new user / remove user**
  - RA-pwoiltldocushare@pa.gov

- **Passwords expire every 60 days.** If you require a password reset, you will need to contact Account Administration by calling (800) 281-5340.

- You should mark your calendars 8 weeks from your password reset so you are prompted when it is about to expire. DocuShare will NOT alert you when your password is about to expire. If you are unable to log-in for any reason, it is likely because your password is incorrect or has expired.
Questions???
Appendices for additional informational purposes:

- Errors
- Reports
- SNHTF
- W16 Form
- Summary
Errors Not Processed

- The Following entries will not be processed for payment (NHT01-05):
  - Incorrect provider name,
  - Partial units,
  - Service delivery entries into SAMS without using the daily unit details calendar, and
  - An Incomplete NHT Outreach Form.

The above entries require corrections in SAMS. When these corrections are made, they will be processed in a subsequent Payables Report.
## Berks County Area Agency on Aging

### Nursing Home Transition Services Report Consumers in SAMSSS

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<tr>
<th>PSA_ID/Provider</th>
<th>Client ID</th>
<th>Consumer Name</th>
<th>For the Service</th>
<th>Service Date</th>
<th>Units</th>
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</table>
Errors/Exceptions

- Total NHT 01 units per transition are capped at 240. An exception may be requested and approved for up to 480 units with justification and documentation.

- Total NHT 01 units per day are capped at 32. If you enter units above the daily cap of 32 units, NHT staff will disapprove all units and give you an opportunity to re-enter up to 32 units per day, unless justification and documentation has been provided.
Errors/Exceptions

- Transition payments out of order will cause an error:
  - NHT02A cannot be billed before NHT01
  - NHT02B cannot be billed before NHT02A
  - NHT03 cannot be billed before NHT02A
  - NHT04 cannot be billed before NHT03
  - NHT05 cannot be billed before NHT04

- NHT03 – NHT05 contacts of non-waiver persons without care management services before the allowable timeframes after transition will cause an error:
  - NHT03 – before 90 Days
  - NHT04 – before 180 Days
  - NHT05 – before 365 Days
NHT staff review errors and approve them upon you contacting NHT staff with documentation and justification.

An essential part of the NHT staff review process includes checking journal entries about issues that would justify payments for services outside the normal caps and timeframes.
Reports
Monthly Reports

- OLTL will run reports monthly just as it occurs now.
- The report will determine which entered service deliveries should:
  - appear on Payables report
  - which entered service deliveries contain errors that the provider must correct,
  - which entered service deliveries require additional review by OLTL staff in order for payment to occur, and
  - Which payments are eligible for state and federal funding or require the PROMISe W7337 code.
Reconciliation reports are run bi-annually to check for:
- Duplicate entries for the same service,
- More than one transition within 180 days, and
- Incorrect unit rates.

OLTL staff review and approve or disapprove these service entries.

The results are incorporated into the reconciliation process.
NHT Payables Timeline (example)

- **July**
  - Payables Report is run - OLTL review

- **August**
  - Providers enter service deliveries using dates on calendar

- **September**
  - OLTL staff review complete process

- **October**
  - Payables Report with errors posted on DocuShare

1/18/2017
NHT Monthly Payables Timeline

- NHT services (NHT01-NHT05) were entered into calendar in July 1 – 31.
- On August 1, the NHT Payables Report was run for all services entered July 1 – 31.
- OLTL staff review the report and approve or disapprove potential errors by August 15.
- OLTL staff process and forward for payment by September 15 unless they are Waiver eligible.
- Payables Report with errors posted on DocuShare by October 31. Payment should be received close to this same time.
SNHTF-Special Nursing Home Transition Funds
Special Nursing Home Transition Funds require prior authorization from the OLTL NHT Team. Requests may be sent to ra-transitionfunding@pa.gov using the Funding Request form.

Services under SNHTF mirror those in Community transition Services (CTS):

- NHT-equipment, furnishings, initial supplies
- NHT-moving expenses
- NHT-personal/environmental safeguards
- NHT-security deposit
- NHT-Utility set up fee or deposit
SNHTF may be requested when:

- The total amount requested under CTS has exceeded the permitted $4,000.
- The individual is entering a program that does not offer CTS such as ACT 150, LIFE, Options, or CSP.
- The individual does not meet the NFCE level of care criteria.
- “Stranded costs” have been incurred (prior authorized costs).

SNHTF may only be used when all other resources have been exhausted.

SNHTF are state only dollars and the availability is contingent upon funds being made available by the Pennsylvania Department of Aging.
SNHTF expenditures are entered into the NHT Care Plan in SAMS and should list what is being requested as a service in the NHT Care Plan.

- The NHT care plan should match the Funding Request Form.
- If the actual amount spent is less than the NHT Care Plan, the care plan should be modified to reflect actual costs. If the actual amount spent is **MORE** than authorized, an amended request should be sent to ra-transitionfunding@pa.gov.

SNHTF are billed in the SAMS service delivery under the NHT Care Enrollment.

In order to be payable there must be a service allocation in the service plan, a service order, and a service delivery.
SNHTF Reports

- SNHTF reports will be run on a quarterly basis. These reports will be placed into each agency’s DocuShare folders.

- Two types of reports:
  1. Payables
  2. Errors that require correction by the NHTCA:
     - Incorrect Provider Name
     - No partial units-service units (must be unit of 1)
     - Service delivery amount exceeds service order or service allocation amount (should be: $SD \leq SO \leq SA$)
     - Service delivery date falls outside date range of service order, service allocation, or both
       - Date conformity error
       - Usually caused by failure to enter SD via daily unit details calendar
       - Without calendar entry, SD date defaults to 15th of the month

1/18/2017
Once an error has been corrected by the NHTCA it will appear on the next quarter’s payable report.

Both the SNHTF payables and error reports are reviewed by OLTL staff.
W16 Report Submission
Allowable activities to report include:

- Staff time dedicated to following up with discharge planners on consumers with scheduled discharge date
- Assessing the needs and supports of the NHT participant
- Developing the ISP for transition and the coordination of services to allow the participant to live independently in the community
- Monitoring transition activities
W16 Report Submission

- Providing information to the NHT participant about community resources
- Assisting in finding housing
- Assisting the participant in establishing a household
- Providing assistance to participant and family members for qualifying for services (e.g. Medicaid, food stamps, home adaptations, etc.)
- Coordinating with medical providers to obtain required documentation
- Other activities performed for the participant directly related to support the NHT initiative
The W16 file for the quarter should be submitted after the monthly payments for the quarter that appear on DocuShare. Reports are to be based on actuals not estimated numbers.

- Period 3 – July-August-September
- Period 6 – October-November-December
- Period 9 – January-February-March
- Period 12 – April-May-June
- Period 13 – after all reconciliations completed
<table>
<thead>
<tr>
<th>Allot Periods</th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D. w/t</th>
<th>E. w/t</th>
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A sample of the W16 form will be included in the initial Provider Enrollment Packet.

Completed forms are to be sent to:

- OLTL Finance at ra-nh_assessments@pa.gov (underscore between nh_assessments@pa.gov)
Summary
The NHT Payable Report is based on dates services were entered into SAMS, not dates of service.

Entries must be made using the daily unit details calendar.
The following entries are not processed and providers need to make corrections in SAMS:

- Entries not using the daily unit details calendar
- Entries with partial units
- Entries with wrong provider name
- NHT Outreach Form not completed (NHT02A)

When corrections are made to the above entries, they will be processed in a subsequent report.
Summary

- Proper documentation ensures that OLTL staff can adequately review and approve unusual entries.
- Each provider has staff enrolled in DocuShare.
Separate reports for each provider will be posted in DocuShare that will include:

- All payables entered and processed during the month (NHT Services MM/YYYY)
- Errors not processed (Items to be Corrected)
- Errors/exceptions reviewed by NHT staff with approval/disapproval (Errors)

W16 quarterly reports for NHT01 services need to be submitted after the last Payables report for the quarter is posted on DocuShare.