



Aging Well PA, LLC

---

# Aging Well PA Desk Review Cheat Sheet

---

Updated 4.16.2021

# Table of Contents

- [What is a Desk Review and who can do them?.....3](#)
- [Criteria for a Desk Review .....4](#)
- [Reference Dates.....5](#)
- [How to Determine Next Annual Date for Priority Desk Reviews.....6](#)
- [Discrepancies.....7](#)
- [Desk Review Template.....8](#)
- [Weekly Desk Review Tracking Sheet.....9](#)
  - [Additional Desk Review Items.....10](#)
    - [When to email QCSS?.....10](#)
    - [Practice Scenarios.....10](#)
    - [Access to Aging Well Website.....10](#)
- [Desk Review Flow Chart.....11](#)

## What is a Desk Review and who can do them?

- A desk review is a comparison between two sets of MCO-FED data.
- MCO FED data are FED questions pulled from the interRAI-HC assessment completed by one of the MCOs interfaced with PIA.
- The MCOs upload the interRAI-HC to PIA & PIA extracts FED data from it & generates the FED. This is done on a nightly basis.
- You may see more than two data sets within a year. The MCOs can administer the interRAI-HC whenever they think it is needed
- **Who can do a Desk Review?**
  - Any agency personnel who are already users in PIA with the role of assessor.
  - If you want additional people doing desk reviews, they must complete the FED & PIA training, have a b-account, & be given access to PIA.
  - Desk reviews DO NOT have to be completed by an assessor, but they must have the assessor role in PIA

# Criteria for a Desk Review

## Priorities

- *MCO FED NFCE- MCO FED NFI*
  - Complete as a Priority and email QCSS
  - The Assessment Type is not part of the determining criteria
  - When you email your QCSS you will include the next Annual due date.

or

- AAA FED NFCE- MCO FED NFI
  - Complete as a Priority and email QCSS
  - AAA FEDs may only be used when HCBS or Other waiver.
  - When you email your QCSS you will include the next Annual due date.

## Annuals

- MCO FED NFCE- MCO FED NFCE
  - There must be at least 300 Days between FEDs. Make sure that a Desk Review for the same time period has not already been completed.  
Reminder: The Assessment Type is no longer part of the determining criteria

\*Note: Prior to submitting a Desk Review please remember to review each FED for completion. If there are any questions left blank in sections B- E the FED is considered incomplete and should be entered on the DR tracking sheet as FED Incomplete.

## Reference Dates

- Use Reference dates inside each MCO FED to determine the time in-between MCO FEDs
  - We do not use submitted date. These dates can often be incorrect, so we go by the reference dates inside the MCO FEDs.
  - This will mean you must open each MCO FED for the reference date.
  - Use reference date to determine your next annual date when necessary.
- When counting the reference dates for annuals (300-365 days), ask yourself “Where does the clock start or restart” or “When does it qualify or requalify?” when thinking through the starting date to begin counting your 300 days.
  - For Annuals the cases must stay *consecutively* NFCE since you started counting the 300 days. If the level of care changed to NFI and back to NFCE, the clock restarts with the requalifying NFCE MCO case’s reference date.
  - If there is an annual Desk Review already completed, you would then use the last used NFCE MCO FED’s reference date from that annual desk review to start counting for your next annual date.
- Helpful website to count time between reference dates:  
<https://www.timeanddate.com/date/duration.html>

## How to Determine Next Annual Date for Priority Desk Reviews

- When do you need the next annual date?
  - For any priorities completed, added to the email to your QCSS to log. You will email the initials, PIA ID, and next annual date.
- Next Annual Dates for priorities are found by adding 1 year minus 1 day from the reference date. You will use the last NFI FED for the annual date since the level of care has changed.

## Discrepancies

- To review a Desk Review you will look at personal demographics only to determine if there are any discrepancies between them.
  - If so, check “Yes” for the question “Is There a Discrepancy?”
  - If not, check “No.” If No, then you do not need to add comments since there are not any discrepancies.
- List the discrepancies in the comment section by stating the difference.
  - An example can be: First FED states female, Second FED state male.
- What to review for discrepancies?
  - Review Personal Demographics only for discrepancies (will be located on first page of FED).
  - Disregard the voter or veteran questions answered in MCO FED. They will be blank. Do not list these as a discrepancy.
  - If missing on both FEDs being compared, it is not considered a discrepancy
  - For MCO NFCE- MCO NFCE Annuals you should notate if over 365 days.

## Desk Review Template

- Desk Review Templates are for priorities only.
- Comments section should state “See attached desk review template” after your listed discrepancies (if there are any).
- Fill this form out by listing the answer to each question. If multiple questions in a section place a comma in between (example: 1,2,1,1)
  - If there is an “and/or” provide an answer for both.
  - If an answer to the DR template is missing on one of the MCO FEDs please place on DR Template sheet as “FED incomplete.” These are considered an error that needs to be fixed.
- Attach this form to the desk review attachment section.
  - Use the most up to date desk review template located on the Aging Well Website.



# Weekly Desk Review Tracking Sheet

- Definitions of items you place on the Desk Review Template Include:
  - **NFI-NFI** (used when the data in the MCO FEDs is complete AND the MCO FEDs are all NFI)
  - **NFI Initial Only** (used when only one complete MCO FED is available in PIA and it shows NFI)
  - **NFI-NFCE** (used when there are two MCO FEDs, the previous FED is NFI, and the most recent one is NFCE).
    - Note: This is not to be used when there are multiple NFCE's following the NFI. That would need to be checked for 300 days.
  - **FED Incomplete** (used when MCO FED data is incomplete but PIA shows an outcome of NFI or NFCE)
  - **Other** (used for unique cases that prevent desk reviews from being completed; it should be used sparingly)
- The following items **no longer** need to be tracked:
  - Only 1 Redetermination in PIA
  - Less Than 300 Days Between FEDs
  - Next Annual Due Date (This is now *only* required for priority desk reviews)

**\*The tracking sheet is due to your QCSS no later than *noon* each Monday.**

## Additional Desk Review Items

### When to email QCSS?

- For Priorities:
  - MCO NFCE to MCO NFI or AAA NFCE to MCO NFI: Include initials, PIA ID, and next annual date in email only.
  - Reminder: annual dates for priorities go by the NFI FED since the eligibility as changed.
- DR Sheet is sent each week no later than noon on the following Monday

### Practice Scenarios

- Please refer to the practice scenarios on our website that provide many examples.

### Access to Aging Well Website

- Website: <https://agingwellpa.org/>
- Password: AWP FED2019

# Desk Review Flow Chart

