



Aging Well PA, LLC

Aging Well PA Desk Review Cheat Sheet

Updated 5.30.2023

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What is a Desk Review and who can do them?

- A desk review is a comparison between two sets of 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
 - Email your QCSS when complete letting them know the initials and PIA number of the priority completed.

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. If you feel a NF FED was used for entry into CHC please contact your QCSS for permission to use (see page 9).
 - Email your QCSS when complete letting them know the initials and PIA number of the priority completed.

Annuals

- MCO FED NFCE- MCO FED NFCE
 - There must be at least 300 Days between FEDs reference dates. 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.

NFI to NFI

Please see [Exhibit A](#) for further information.

- *Note: Prior to submitting a Desk Review please remember to review each FED for completion. If there are any questions left blank the FED is considered incomplete and should be entered on the DR tracking sheet as FED Incomplete and list out the questions missing. Then move forward and complete the Desk Review. If the Desk Review being completed is a priority, when completing the template, you will leave the incomplete section blank on the template. (See Desk Review Template Section)

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 between FEDs), 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 between FEDs.
 - For Annuals the cases must stay consecutively NFCE since you started counting the 300 days between FEDs. If the level of care changed to NFI and back to NFCE, the clock restarts with the requalifying NFCE MCO case’s reference date.
- We only complete annuals for consecutive years and do not skip a year.
Example: If there are reference dates for 2020, 2021, and 2022 we could only review from 2020-2021 or 2021-2022 if the dates were 300+days between FEDs. If you have years missing and your reference dates only went from 2020-to 2022, then you would be able to proceed with a desk review since there was a year missing.
 - 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>

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 states 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. Example: Section D should have 9 answers.
 - If an answer to the Desk Review template is missing on one of the MCO FEDs, please place it on the Desk Review Weekly Spreadsheet sent at the end of the week as “FED incomplete,” and list out the questions missing. These are considered an error that needs to be fixed.
 - You should **also** move forward and complete the Desk Review. If the Desk Review being completed is a priority, when completing the template, you will leave the incomplete section blank on the template.
 - For example: If the cognition section was incomplete in the MCO FED when you complete the template, the cognition section does not need to be scored. Let that section be blank because the answers are blank, and complete the rest of the template as usual.
- Attach this form to the desk review attachment section.
 - Use the most up-to-date desk review template located on the Aging Well Website.

Desk Review Tracking Sheet- no longer sent weekly

- Definitions of items you place on the Desk Review Template Include:
 - **FED Incomplete** (used when MCO FED data is incomplete but PIA shows an outcome of NFI or NFCE).
 - List out the questions that are missing in the last column.

Additional Desk Review Items

When to email QCSS?

- Desk Review Sheet is sent each week no later than noon on the following Monday.
- If it looks like a Nursing Facility NFCE FED was used as entry into CHC and is immediately followed by an MCO NFI FED. You will need to email your QCSS for permission to use the NF FED for a priority. Your QCSS will review the case.
- If you have two MCO NFCE FEDs with the same reference date, but the submitted dates are a year apart. You will need to email your QCSS. Your QCSS will review the case and respond.

When to email AAA Request email box for desk reviews?

- For Priorities:
 - MCO NFCE to MCO NFI or AAA NFCE to MCO NFI: Include initials and PIA ID in email only.
 - Reminder: Annual due dates for priorities no longer need to be documented.
- NFI to NFI Desk reviews (see [Exhibit A](#)).

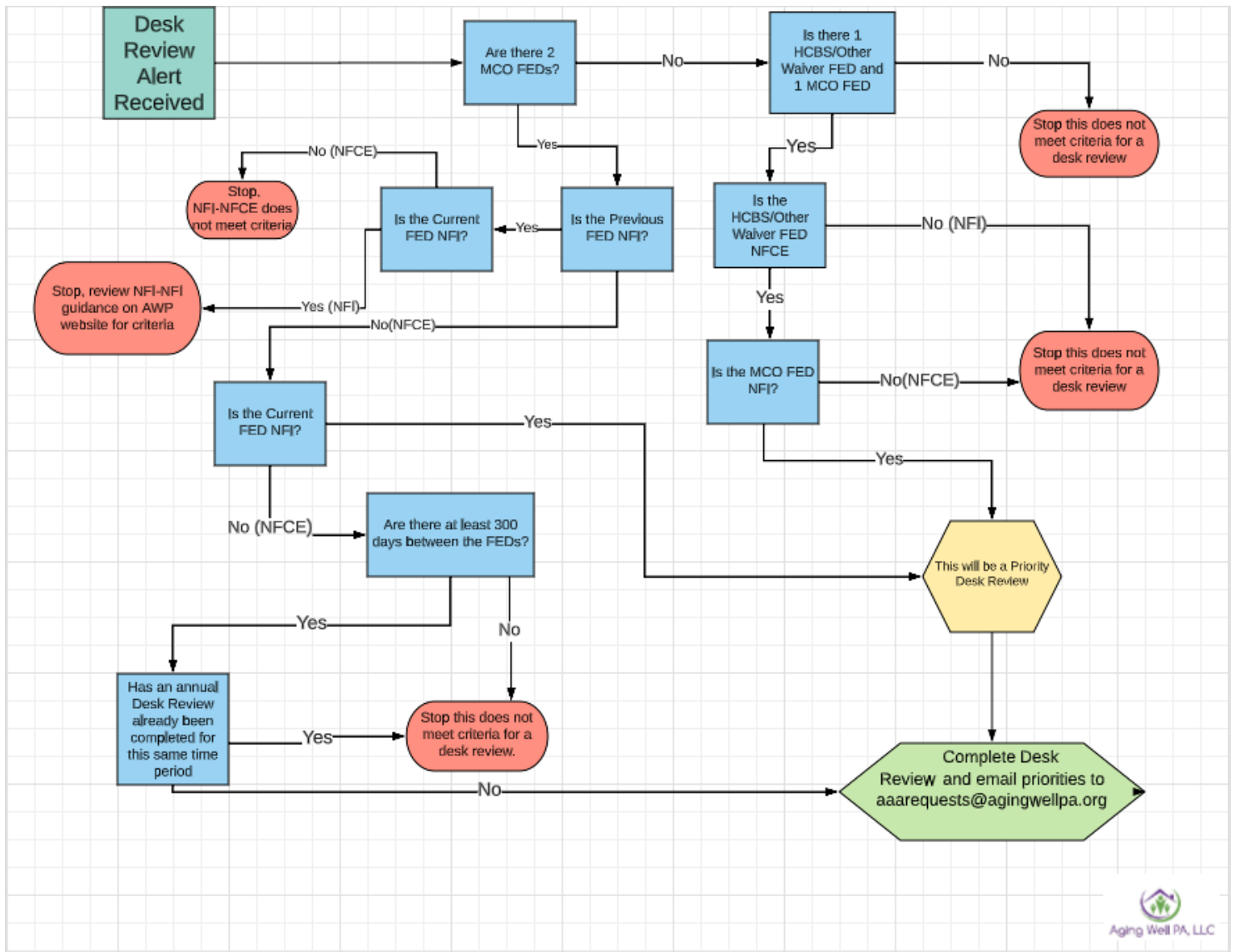
Practice Scenarios

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

Access to Aging Well Website

- Website: <https://agingwellpa.org/>
- Password: AWPFD2019

Desk Review Flow Chart



*For information on NFI to NFI desk reviews please see [Exhibit A](#) on the next page.

Exhibit A

Starting May 1, 2023, Aging Well is adding to the desk review criteria. The AAA should now complete a desk review between an **MCO** NFI FED and an **MCO** NFI FED in the specific situations outlined below. (Previously, when two MCO FEDs were NFI to NFI, it was added to the weekly desk review tracking sheet).

New NFI to NFI Procedure:

A desk review **should** be completed in the below scenarios:

- a) The PIA profile shows all MCO FEDs are NFI, and a priority desk review was not previously completed. The AAA would compare the two most recent MCO NFI FEDs.

Example: The AAA would complete a desk review using ACFC FED 1/13/2023 NFI (most recent) and compare it to ACFC FED 9/26/2022 NFI (previous).

Maximus Interface	02/28/2020	HCBS	N/A	Completed	03/05/2020	NFCE
ACFC	03/26/2020	Redeterminations	Initial	Completed	04/02/2020	NFI
ACFC	09/22/2020	Redeterminations	Significant Change	Completed	09/22/2020	NFI
ACFC	10/22/2021	Redeterminations	Annual	Completed	10/22/2021	NFI
ACFC	09/26/2022	Redeterminations	Annual	Completed	09/26/2022	NFI
ACFC	01/13/2023	Redeterminations	Significant Change	Completed	01/13/2023	NFI

Desk Review								Create New
Start Date	Due Date	Submitted Date	Created By	Submitted/Withdrawn By	Status	Status Last Modified Date	Actions	
No data available in table								

- b) The PIA profile shows that the most recent MCO FEDs are NFI to NFI, and a priority desk review was done before November 1, 2022.

Example 1: *A priority desk review was submitted on 12/10/2021.**

The AAA **should** complete a desk review using ACFC FED 4/12/2023 NFI (most recent) and compare it to ACFC 12/1/2022 NFI (previous).

ACFC	11/12/2020	Redeterminations	Initial	Completed	11/25/2020	NFCE
ACFC	12/10/2021	Redeterminations	Annual	Completed	12/10/2021	NFI
ACFC	12/01/2022	Redeterminations	Annual	Completed	12/01/2022	NFI
ACFC	04/12/2023	Redeterminations	Significant Change	Completed	04/12/2023	NFI

A desk review **should NOT** be completed in the below scenarios:

Example 1: * A priority desk review was submitted on 12/1/2022.**

A priority desk review was already completed after November 1, 2022, using ACFC 12/10/2021 NFCE and ACFC 12/1/2022 NFI.

ACFC	11/12/2020	Redeterminations	Initial	Completed	11/25/2020	NFCE
ACFC	12/10/2021	Redeterminations	Annual	Completed	12/10/2021	NFCE
ACFC	12/01/2022	Redeterminations	Annual	Completed	12/01/2022	NFI
ACFC	04/12/2023	Redeterminations	Significant Change	Completed	04/12/2023	NFI

Example 2: ***A Priority Desk review was submitted on 3/19/2020

The AAA **should not** complete a desk review in this scenario because the most recent MCO FED is NFCE, and the previous MCO FED is NFI. A desk review is never completed for NFI to NFCE scenarios.

PHW	02/06/2020	Redeterminations	Annual	Completed	02/07/2020	NFCE
UPMC	03/01/2020	Redeterminations	Initial	Completed	03/19/2020	NFI
UPMC	11/03/2020	Redeterminations	Annual	Completed	11/04/2020	NFI
UPMC	09/20/2021	Redeterminations	Annual	Completed	09/21/2021	NFI
UPMC	08/31/2022	Redeterminations	Annual	Completed	09/01/2022	NFI
UPMC	04/10/2023	Redeterminations	Significant Change	Completed	04/12/2023	NFCE

Due to the end of the public health emergency, OLTL seeks to disenroll clinically ineligible individuals from CHC using a phased approach with a six-month look-back.

The MCOs will be responsible for reassessing individuals who were deemed NFI between November 1, 2022, and January 31, 2023. You may notice an increase in alerts. Please review those according to the usual process.

The AAAs will be responsible for completing desk reviews for any individuals determined NFI after February 1, 2023, using the timeline in the table below. Further details will be provided. If you have additional questions, please contact your QCSS.

Phase 1	Phase 2	Phase 3
<ul style="list-style-type: none">• AWPAs will send the AAA the NFI to NFI list from February on May 1, 2023.• AAA will complete all required desk reviews that meet the criteria by May 31, 2023.	<ul style="list-style-type: none">• AWPAs will send the AAA the NFI to NFI list from March on June 1, 2023.• AAA will complete all required desk reviews that meet the criteria by June 30, 2023.	<ul style="list-style-type: none">• AWPAs will send the AAA the NFI to NFI list from April on July 5, 2023.• AAA will complete all required desk reviews that meet the criteria by July 31, 2023.

Notification must be sent immediately to the aaarequests@agingwellpa.org email address upon completion of any NFI to NFI desk reviews that meet criteria.