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# Aging Well PA Desk Review Cheat Sheet

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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 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 [aaarequests@agingwellpa.org](mailto:aaarequests@agingwellpa.org) when the priority desk review is completed and provide AWP with the initials and PIA ID number.

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 an NF FED was used for entry into CHC, please contact your QCSS for permission to use it.
  - Email [aaarequests@agingwellpa.org](mailto:aaarequests@agingwellpa.org) when the priority desk review is completed and provide AWP with the initials and PIA ID number.
- MCO FED NFI – MCO FED NFI
  - A priority desk review should be completed if 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.
  - Email [aaarequests@agingwellpa.org](mailto:aaarequests@agingwellpa.org) when the priority desk review is completed and provide AWP with the initials and PIA ID number.
- Please check desk review alerts carefully to determine if a priority desk review is needed. Keep in mind that the purpose of the priority desk review is to start the disenrollment process due to clinical ineligibility. And, the way the process currently works, the same person could potentially go through the disenrollment process more than once when new NFI MCO FEDs are done.
  - Before doing a priority review, look in the PIA attachments.
  - If a 1768-New FED or Appeal Outcome is attached, this means that the previous NFI disenrollment was finalized. If the current NFI FED is dated after the 1768 New FED or Appeal Outcome was sent to the CAO, complete a new priority desk review and notify [aaarequests@agingwellpa.org](mailto:aaarequests@agingwellpa.org).



- If a priority desk review was previously completed, and NFI disenrollment was not started at that time, **STOP** and email your QCSS to ask if another priority is needed.

## **Annuals**

- MCO FED NFCE- MCO FED NFCE
  - There must be at least 300 days between the FED reference dates. Ensure that a Desk Review for the same time period has not been completed. Reminder: The Assessment Type is no longer part of the determining criteria.
- \*Note: Before submitting a Desk Review, please remember to review each FED for completion. If there are any questions left blank, the FED is considered incomplete. Email the PIA I D to your QCSS. Then, move forward with completing the Desk Review. If the Desk Review is a priority, you will leave the incomplete section blank on the template when completing it. (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 2021 to 2023, you would proceed with a desk review since a year was missing.
  - If an annual Desk Review was previously 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 the answer is no, you do not need to add comments since there are no 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 (These will be located on the first page of FED).



- Disregard the voter or veteran questions in the MCO FED. They will be blank. Do not list these as a discrepancy.
- If information is missing on both FEDs being compared, it is not considered a discrepancy
- For MCO NFCE- MCO NFCE Annuals, you should notate if it is over 365 days.

## Desk Review Template

- Desk Review Templates are for **NFCE to NFI** priorities only.
- Comments section should state “See attached desk review template” after your listed discrepancies (if there are any).
- Fill the template 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 nine answers.
  - If an answer to the Desk Review template is missing on one of the MCO FEDs, please email your QCSS the PIA ID for the incomplete FED and list the missing questions. These are considered errors that need to be fixed.
    - You should **also** move forward and complete the Desk Review. If the Desk Review being completed is a priority, you will leave the incomplete section blank on the template when completing it.
    - 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 the Desk Review Template to the Desk Review Attachment section (not under the personal information attachments).
  - Use the most up-to-date desk review template located on the Aging Well Website.

## Additional Desk Review Items

### When to email QCSS?

- 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 the 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



## Practice Scenarios

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

## Access to the Aging Well Website

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

## Desk Review Flow Chart

