

## DHCF's Tips for Case Managers

- I. Introduction to the EPD Waiver Program
  - a. Overview of EPD Waiver Program
  - b. Overview of Financial Eligibility & Level of Care Eligibility
    - a. DHS Makes Financial Eligibility Determinations
    - b. Income & Resource Test
      - 1. Income: At or Below 300% of SSI Federal Benefit Rate (Income Threshold higher than State Plan Medicaid)
      - 2. Resource: Must Not Exceed \$4000 in Countable Resources
      - 3. What is Spend-down?
  - c. DHCF Handles Level of Care Eligibility
    - a. Overview of Eligibility for EPD Waiver & PCA Services
      - 1. Meeting Nursing Facility Level of Care
      - 2. Determination of # of PCA Hours
    - b. Liberty Assessment Process
      - 1. Prepare Beneficiary for Assessment by Explaining Process
      - 2. Arrange to Be Present (At least Telephonically) if Beneficiary Does Not Have Anyone Else to Assist
- II. Options for Beneficiary Who Does Not Meet LOC, or is Dissatisfied with # of Hours
  - a. File Appeal at OAH
  - b. Request Reconsideration
    - 1. Note: If Beneficiary does not meet LOC, but is financially eligible for State Plan Medicaid, they may begin to receive the PCA hours awarded under the assessment while they appeal LOC determination.
  - c. Overview of Reconsideration Process
    - 1. Requirements: Two Letters (Doctor & Representative)
      - a. Helpful Information to Include
    - 2. Other Information A Beneficiary May Provide
  - d. Discuss Potential Settlement Agreements
    - 1. DHCF may settle reductions of 1-2 hours if LOC is met on a case-by-case basis
- III. Common Issues with Cases:
  - a. When You File a Case, Make Sure to Inform the Beneficiary & Family
  - b. If You Timely File A Case, Make Sure Services Stay in Place
  - c. Attestations Are No Longer Accepted.
    - 1. If you submitted an attestation, please make sure that the beneficiary was not appealing a reduction based on the previous assessment. If you find this has occurred, please submit a POF to have them reassessed.
  - d. Please Monitor Filed Cases:
    - 1. If Petitioner's Condition Changes, Request New Assessment Based on Change of Condition
    - 2. Dismiss Cases if Reassessment Resolves Issue, if Petitioner Passes
    - 3. PHE: Reductions and Terminations won't be implemented until after PHE is over, so cases appealing these determinations can be dismissed. Notices will go out after the PHE ends with appeal rights.