

OPWDD Guidance Documents with Payment Standards

This guidance document contains payment standards, with all payment standards shaded in grey. Any requirement in this guidance document which is not shaded in grey is a program standard or an explanation, illumination or illustration to aid auditors in interpreting the documents. Please note that there may be instances where materials may be partially shaded in a sentence, paragraph or beneath a header. It is OPWDD's intent that only those words that are shaded shall be considered part of a payment standard and any other words within a sentence or paragraph or below a header that are not shaded should be construed to be a program standard or an explanation, illumination or illustration to aid auditors in interpreting the document.

Appendix B: Service Documentation Requirements for General Developmental Disability Per Unit Services (Dementia Support)

Purpose

This Appendix describes the documentation requirements for General Developmental Disability (DD) Per Unit Services (Dementia Support) within Options for People Through Services (OPTS) pilots.

Reporting General DD Per Unit Services (Dementia Support)

Dementia Support services are services provided by dementia support staff who work with consumers and care providers to develop individualized and comprehensive steps to address a consumer's needs relating to Alzheimer's Disease or a related dementia. Dementia Support services may include educating a consumer's care providers about the disease and approaches to care for consumers with Alzheimer's or dementia. Guided discussion groups may also be held on dementia-specific needs or concerns for care providers, families, and consumers. Staff may also assess the environment to identify any adaptations that may be needed to ensure a consumer's safety and independence; and develop an action plan to address the needs of the consumer with Alzheimer's or dementia.

The unit of service for General DD Per Unit Services (Dementia Support) is one unit in a month. Staff who are providing the services can be "regular" payroll staff or paid contract staff. In order to be paid for General DD Per Unit Services (Dementia Support), your agency must have a Provider Agreement that is signed by the residential and/or day service provider with which your agency works to support the consumer's aging in place.

Billing Standard and Format for Documenting General DD Per Unit Services (Dementia Support)

Your agency must use the OMRDD-developed Monthly Summary Narrative Note format to document the provision of General DD Per Unit Services (Dementia Support). A copy of the note format is included with this Appendix.

Each claim for payment must be supported by the Monthly Summary Narrative Note that contemporaneously documents at least one face-to-face contact with the consumer and indicates the date and location of the contact. In addition, the note should discuss the consumer's response to the services that your agency provides during the month. These services may be provided directly to the consumer (e.g., hands-on education) or indirectly to the consumer (e.g., peer discussion groups). The Monthly Summary Narrative Note should also address any issue or concerns. Detailed directions for completing the Monthly Summary Narrative Note are attached.

The Monthly Summary Narrative Note must be signed by staff who actually conduct the face-to-face visit. By signing the Monthly Summary Narrative Note, the staff who deliver the service are documenting that a face-to-face contact was conducted during that month.

Reporting General DD Per Unit Services (Dementia Support)

Payment for Dementia Support services under OPTS will be issued to your agency based on service information that your agency submits to OMRDD via the OPTS Services Recording Application. When reporting services via the OPTS Services Recording Application, your agency will report only one unit of General DD Per Unit Services for each month where the minimum billing standard is met. The unit of service should be reported on the day when the face-to-face contact occurred. If more than one face-to-face contact occurred in a given month, report only one on the OPTS Services Recording Application. However, all services must be documented on the Monthly Summary Narrative Note.

Assessment/Review Fee Requirements

An exception to reporting only one unit in a month may occur two times a year, to coincide with the six-month review of the consumer's goal plan, if your agency is eligible for a special Assessment/Review Fee. The Assessment/Review Fee may be claimed when staff document at least one face-to-face contact with the consumer and staff complete assessments, reports, surveys, or establish or update a goal plan. For months when your agency submits a claim for an Assessment/Review Fee, the Monthly Summary Narrative Note must document the reason for the special higher payment. In addition, copies of the completed assessments, reports, or survey instruments must also be retained (see Required Documentation below).

Your agency will receive the Assessment/Review Fee by submitting a claim for two units of General DD Per Unit Services (Dementia Support) in a month via the OPTS Services Recording Application. In such a month, your agency should report the first unit on the date that the face-to-face meeting occurred and the second unit on the date the assessments, reports, surveys or goal plans are completed. Two units of service may be recorded on a single day of the month only when the goal plan, assessments, reports, or surveys are completed on the same day that the face-to-face meeting occurred. Note: The special Assessment/Review Fee may only be claimed for a single consumer two times per calendar year, although goal plan reviews and other assessment services may be provided more frequently.

Required Documentation

Your agency must maintain the following documentation to support the provision of Dementia Support services:

- **The Monthly Summary Narrative Note-OPTS General Developmental Disability Per Unit Services (Dementia Support) written for each consumer served that month.** The Monthly Summary Narrative Note must describe the service(s) that staff provided to the consumer and/or the consumer's caregivers. Staff must use the narrative note to document the face-to-face contact and the date and location of the contact. The narrative note should also discuss the consumer's response to the service(s) and any issues or concerns that have arisen. A copy of the Monthly Summary Narrative Note format is included with this Appendix.

- **The Provider Agreement** which is signed by your agency and the consumer's residential habilitation and/or day service provider with which your agency works to support the consumer aging in place.

- **Supporting Documentation** for the payment of any Assessment/Review Fees. For any month where your agency requests payment for the Assessment/Review Fee, one of the following documents must be completed during the month and retained in the consumer's record:
 - Dementia Support Services Program Pre-Assessment
 - Dementia Support Services Program – Goal Plan or Update of Goal Plan
 - Therapeutic Environment Screening Survey for Nursing Homes
 - Discharge Risk Assessment Protocol
 - Dementia Support Services Program Care Consultation Report

- For Individuals with Individualized Service Plans (ISP), **a copy of the consumer's ISP** covering the time period for the claim developed by the consumer's Medicaid Service Coordination (MSC) or Plan of Care Support Services (PCSS) Service Coordinator. The OPTS General Developmental Disability Per Unit Services (Dementia Support) must be identified in Other Services or 100% OMRDD Funded Supports and Services section of the ISP and the required information must be completed as follows.

Name: Your Agency's Name Here

Type of Service: OPTS General DD Per Unit Services (Dementia Support)

Frequency: Month **Duration:** Ongoing **Effective Date:** No later than the 1st day of service delivery

Person's Valued Outcome or Reason for Receiving the Service:

Valued Outcomes for receiving General DD Monthly Services (Dementia Support)

Documentation Retention

All documentation specified above must be kept the balance of the calendar year in which they were made and for six (6) additional years thereafter. See Appendix A for additional requirements regarding record retention.