

**Revision History**

Date	Version	Description	Author
September 16, 2024	1.0	Initial publication	EOEA Home Care Team

**Guidance for Creating & Terminating CAE Care Enrollments in Aging & Disability (A&D)**

Clinical Assessment & Eligibility (CAE) Care Enrollments are created in a consumer’s record within A&D when the consumer requires a CAE service completed on their behalf by the ASAP RN, see below for a list of CAE services.

The CAE Care Enrollment is required so that the ASAP may record Service Orders and Service Deliveries for CAE services within A&D. CAE Service Orders and Services Deliveries must be completed in accordance with *SIMS Job Aid: Using Service Orders & Service Deliveries for CAE Screenings (March 1, 2022)* and subsequent versions.

**List of Clinical Assessment & Eligibility Services**

#	Service	Unit type
1	ADH Initial Determination	screening
2	Community-Based LTSS Initial Determination	screening
3	Community-Based LTSS Re-Determination	screening
4	ECOP - NW Initial Determination	screening
5	ECOP - NW Re-Determination	screening
6	GAFC Initial Determination	screening
7	NF AIH Initial Determination	screening
8	NF Community Initial Determination	screening
9	NF Continuation of Stay Determination	screening
10	NF Conversion Initial Determination	screening
11	NF Non-AIH Initial Determination	screening
12	NF Retrospective Initial Determination	screening
13	NF Short Term Review Determination	screening
14	NF Transfer (NF to NF) Determination	screening
15	Waiver Initial Determination	screening
16	Waiver Re-determination	screening
17	PASRR Non-compliance	referral

## Creating a CAE Care Enrollment

Create the CAE Care Enrollment:

- **Level of Care** = Clinical Assessment & Eligibility
- **Service Program** = Clinical Assessment & Eligibility (CAE) [will set automatically]
- **Care Program** = CAE [will set automatically]
- **Application Date** = set to the date from the identified need for screening or earlier
- **Received Date** = set to the date from the identified need for screening or earlier
- **Termination Date** = leave blank
- **Status** = Active
- **Reason** = leave blank
- **Status Date** = date of the data entry
- **Start Date** = set to the date from the identified need for screening or earlier
- **End Date** = leave blank

Care Enrollment - CAE ✕

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**Level Of Care** Clinical Assessment & Eligibility ▾

**Service Program** Clinical Assessment & Eligibility (CAE) ▾

**Care Program** CAE ▾

**Application Date** 8/12/2024 ⌵

**Received Date** 8/12/2024 ⌵

**Termination Date** Enter date ⌵

**Status** Active ▾

**Reason** ▾

**Status Date** 8/12/2024 ⌵

**Start Date** 8/12/2024 ⌵

**End Date** Enter date ⌵

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The CAE Care Enrollment must remain open until one of the following occurs:

- CAE - Consumer Death
  - Utilize if consumer has passed away.
  - *Please note, if your agency uses Status Wizard to close a consumer's record, the user will need to go in and manually change the termination reason to meet the requirements of this business rule.*
- CAE – Consumer Request
  - Utilize if consumer requests to no longer be assessed for any CAE screenings.
- CAE – Moved from Service Area
  - Utilize if the consumer moves to another ASAP's catchment area. This could be as a result of a NF-NF transfer or the consumer has moved to a new home outside of your agency's area, but still within the state of Massachusetts.
- CAE – Moved out of State
  - Utilize if the consumer moves out of the state of Massachusetts.

## Terminating a CAE Care Enrollment

The CAE Care Enrollment should be terminated for the following reasons:

- Consumer death,
- Consumer moved from current ASAP's catchment area,
- Consumer moved out of state, or
- Consumer request.

Terminate the CAE Care Enrollment:

- **Level of Care** = Clinical Assessment & Eligibility
- **Service Program** = Clinical Assessment & Eligibility (CAE) [will set automatically]
- **Care Program** = CAE [will set automatically]
- **Application Date** = set to the date from the identified need for screening or earlier
- **Received Date** = set to the date from the identified need for screening or earlier
- **Termination Date** = set to date the care enrollment is being terminated/closed
- **Status** = Terminated
- **Reason** =
  - a. CAE – Consumer Death
  - b. CAE – Consumer Request
  - c. CAE – Moved from Service Area
  - d. CAE – Moved out of State

- **Status Date** = date of the data entry
- **Start Date** = set to the date from the identified need for screening or earlier
- **End Date** = Same as Termination Date

Care Enrollment - CAE [X]

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Level Of Care: Clinical Assessment & Eligibility

Service Program: Clinical Assessment & Eligibility (CAE)

Care Program: CAE

Application Date: 8/12/2024

Received Date: 8/12/2024

Termination Date: 9/10/2024

Status: Terminated

Reason: CAE - Moved From Service Area

Status Date: 8/12/2024

Start Date: 8/12/2024

End Date: 9/10/2024

Originated By: Executive Office of Elder Affairs Creator: EOE 3 Sandbox

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