

**Revision History**

Date	Ver.	Description	Author
July 11, 2024	1.1	Addition of E-invoicing Details	EOEA Home Care Team
June 21, 2024	1.0	MFP Demo Relaunch	EOEA Home Care Team

**Money Follows the Person Demonstration (MFP Demo)**

The Money Follows the Person Demonstration (MFP Demo) was launched August 2023 with the Aging Service Access Point (ASAP) network. Note that the MFP Demo **does not** pertain to the MassHealth Moving Forward Plan (MFP) Waivers. This Business Rule and program supersedes and replaces any former guidance and program.

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**MFP Demo Description and Requirements**

The MFP Demo is a Center for Medicare and Medicaid Services (CMS) federally funded demonstration grant that helps older adults and individuals with disabilities transition from nursing facilities, chronic disease or rehabilitation hospitals, or other qualified facilities back to the community. MFP Demo services are arranged for the MFP Demo enrollee by the MFP Demo Case Manager through one of the three approved Case Management Entities:

- Aging Service Access Points (ASAPs),
- Mass Rehabilitation Commission (MRC)
- Department of Developmental Services (DDS)

MFP Demo includes structured case management for 365 days in a qualified community setting following discharge from a nursing facility, chronic disease or rehabilitation hospital, or other qualified facility.

To qualify for the MFP Demo, a person must meet all the following criteria:

- An eligible MassHealth Standard or CommonHealth member or meet financial criteria to qualify and
- Living in a qualified nursing facility or long-stay hospital for at least 60 consecutive days, including Medicare rehabilitation days and
- A resident of Massachusetts
- 18 years old or older and be disabled, or be age 65 or older,
- Transition to an MFP Demo qualified residence in the community

MFP Demo qualified community residences include:

- A home owned or leased by the MFP Demo enrollee or a family member
- An apartment
- A community-based setting where no more than four unrelated people live
- An assisted-living apartment with separate living, sleeping, bathing, and cooking areas; lockable doors; and other features

An individual's eligibility and enrollment in any of the Home and Community-Based Service (HCBS) Waiver programs does not impact an individual's enrollment into the MFP Demo. For individuals who are not eligible for a HCBS Waiver program, MFP Demo can offer the individual services to which they would not otherwise have access.

The MFP Demo identifies two classifications of individuals, known as enrollees and participants:

1. An **Enrollee** in the MFP Demo is an individual who:
  - Has signed an informed consent form
  - Resides in qualified facility
  - Is in a pre-transition (pre-discharge) phase
2. A **Participant** in the MFP Demo is an individual who:
  - Has transitioned out of a qualified facility
  - Has transitioned to a qualified community setting
  - Is in a post-transition (post-discharge) phase

## MFP Demo Specific Services

MFP Demo provides three categories of services and supports that help older adults and individuals with disabilities move from facility-based care back to the community. These services include:

- **Transitional Assistance (TA)** - Non-recurring set-up expenses and short-term services necessary to facilitate a person's transition from a facility-

based long term care setting to the community. Examples of TA include, but are not limited to:

- Finding accessible and affordable housing
  - Paying for moving expenses
  - Paying for security deposits, utility deposits, and first month's rent
  - Purchasing home furnishings
  - Improving accessibility through home and vehicle modifications
  - Providing peer support
  - Purchasing assistive technology devices
  - Providing case management and help with linking you to other available services
- **Assistive Technology (AT)** - Devices, controls, or appliances that enable a person to increase their ability to perform activities of daily living. Examples of AT include, but are not limited to:
    - Communication boards
    - Speech amplifiers
    - Electronic device that produces speech or written output
    - Voice-activated or remote environmental control unit
    - Specialized door opener
    - Customized iPad
    - Specialized alarms
  - **Community Engagement Navigation (CEN)** - A "bridge" service that would include accompaniment and transportation from facilities to community housing and service options; supporting service exploration and linkage; and assistance with connections to and engagement with community services.

## How to Enroll Individuals or Refer to MFP Demo

Individuals who desire to transition to the community have access to the MFP Demo and can be referred by anyone or enrolled by an approved **Case Management Entity** if the eligibility criteria outlined above is met. There are no clinical eligibility requirements for the MFP Demo.

For individuals requesting to enroll in the MFP Demo, an MFP Demo Informed Consent Form must be completed and signed by the individual. The individual must be entered into MFP-IS **within 5 business days** of the date of the signed Informed Consent Form. ASAP staff must keep copies of the MFP Demo Informed Consent

Form and other related program forms in the consumer's record.

**To Enroll** - ASAP staff should only have the Informed Consent Form signed and enter the individual in MFP-IS if they will be completing required MFP Demonstration Case Management pre-transition tasks for the consumer and will be the assigned Case Management Entity.

**To Refer** - If the ASAP staff will not be completing the required MFP Demonstration Case Management pre-transition tasks and serve as the assigned Case Management Entity, only the MFP Demonstration Referral Form should be completed and emailed to the MFP Project Office ([MFPProjectOffice@mass.gov](mailto:MFPProjectOffice@mass.gov)). An Informed Consent Form should not be completed if ASAP staff are making a referral only.

For more information, please refer to the MFP Demo Workflow for referrals and enrollments in the MFP Demo.

## MFP Demonstration Requirements Pre-Transition (Pre-Discharge)

MFP Demo Case Managers are responsible for:

- Supporting and assisting all enrolled individuals transitioning into the community.
- Providing information about the range of community-based services, supports, and housing options.
- Facilitating a person-centered planning process which includes identifying housing options, determining, arranging, and authorizing services needed to ensure a safe transition.
- Conducting a risk assessment and working with the individual to develop an appropriate back-up plan, responsive to the individual's needs and risks.

## MFP Demo Risk Assessment & Back Up Plan Requirements

The risk level for MFP Demo enrollees and participants should be classified as a Risk level 1 or 2 utilizing EOEAs' **Risk Level Assessment Worksheet**.

Prior to the nursing facility transition, ASAP staff are required to complete the **Risk Assessment Form**, which serves as the back-up plan, and detail date of completion within the MFP-IS system. The Risk Level Assessment Worksheet and Risk Assessment Form is in PI 11-06 Risk Management.

The back up plan must include 24-hour back-up system including:

- Critical services
- Transportation
- Direct care workers
- Repair and replacement of Durable Medical Equipment (DME)

- Access to medical care, including:
  - Assistance with initial appointments
  - How to make appointments
  - Resolving appointments or care issues

Completed documents must be uploaded in the Consumer record as a File Attachment in A&D and completed prior to the transition date.

## **MFP Demonstration Requirements Post-Transition (Post-Discharge)**

Following the successful transition of the Participant to the community, the ASAP staff will begin tracking for 365 days.

ASAP staff will be responsible for completing the following actions:

- Confirming Status Change (SC-1) form was submitted from Nursing facility to MassHealth
- Confirming Consumer is transitioned to the community with MassHealth Standard or CommonHealth.
- Completing the necessary updates in the MFP-IS system from enrollee to participant.
- Monitoring the back-up plan and service provisions and adjusting as needed for 365 days in the community.
- Tracking the Consumer's 365 days of community tenure, pausing and extending for any instance the Consumer leaves the community.
- Entering in Events in MFP-IS if the Consumer has another transition of care to a hospital or nursing facility in order to pause the 365-community day count.

## **Data Entry Requirements for the MFP Demo**

Data entry requirements for the MFP Demo consists of entry and documentation in two database systems:

1. Money Follows the Person Information System (MFP-IS) is the database used by all Case Management Entities for enrollment, case management assignment, and transition events.
2. Aging and Disability (A&D) for monitoring and invoicing.

Each system requires separate details to be entered as highlighted in the following sections.

## MFP Information System (MFP-IS) and Data Entry Requirements

The Money Follows the Person Information System (MFP-IS) is the MFP Project Office central system of record to provide a state-wide information service through a network of agencies in support of the MFP Demonstration.

To gain access to MFP-IS, ASAP staff shall:

- Submit a User Request Form (URF) to the MFP Project Office via email
- The URF must be sent by the designated Access Administrator at the ASAP identifying ASAP staff that need access to MFP-IS and what role should be assigned to each staff member. The different roles in MFP-IS are as follows:
  - **Agency Observer:** This role allows designated users to have view-only access to all MFP Enrollee and Participant records managed by their agency/entity.
  - **Resource Management:** This role allows designated users the ability to reassign an MFP Enrollee or Participant to another state agency/entity. Users with this access will also have access to functionality to assign a case manager. No additional functionality is assigned to this role.
  - **Agency Program Staff:** This role allows designated users the ability to view and manage MFP Enrollees and Participants entered and managed by their agency/state entities case managers.
  - **Case Manager:** This role allows the designated users to enter and manage MFP Enrollee and Participant records. Users with this role will have access to only their records, and not the agency data.

ASAP staff must adhere to documentation requirements and data entry requests made by the MFP Demo Project Office and EOE. If the ASAP is the Case Management Entity for MFP Demo, required documentation in MFP-IS includes, but is not limited to:

- Enter new enrollees
- Manage existing enrollees and participants
  - Assign an ASAP Case Manager
  - Enter community transition date
  - Enter dates of completed risk assessment & backup plan
  - Enter readmission or hospitalization events
  - Track 365-day program enrollment
- Manage eligibility statuses
- View and Print reports

For utilization and data entry specific to the MFP-IS system, please refer to the MFP-IS user guide located within the MFP-IS system.

## Aging & Disability (A&D) MFP Demo Requirements

### Creating the MFP Demo Care Enrollment

The ASAP providing MFP Demo Case Management creates a **Money Follows the Person Demonstration (MFP Demo) Care Enrollment** for each consumer who they provide MFP Demo case management and service coordination. A Care Enrollment should not be created if a referral was made. A new Care Enrollment is entered into A&D for all consumers enrolled in the MFP Demo regardless of enrollment in other Home Care programs. An MFP Demo Care Enrollment **should only be completed after the individual has signed the Informed Consent Form.**

If there are multiple ASAPs involved with an individual for the MFP Demo, each ASAP must open, manage, and close their own individual MFP Demo Care Enrollment.

- The Money Follows the Person (MFP Demo) Care Enrollment in A&D includes:
  - **Level of Care** = MassHealth Programs
  - **Service Program** = Money Follows the Person Demonstration (MFP Demo)
  - **Care Program** = Money Follows the Person Demonstration (MFP Demo)
  - **Application Date** = Date of signed Informed Consent Form
  - **Received Date** = Date of signed Informed Consent Form
  - **Termination Date** = Blank while the ASAP staff is actively working with the consumer
  - **Status** = Active while the ASAP staff is actively working with consumer
  
  - **Reason** = Blank while the ASAP staff is actively working with the consumer
  - **Status Date** = Date of signed Informed Consent Form
  - **Start Date** = Date of signed Informed Consent Form
  - **End Date** = Leave Blank while the ASAP staff is actively working with consumer

### Example of new Care Enrollment

Care Enrollment - Money Follows the Person Demonstration (MFP Demo) X

OK | Cancel | Add Next | Open Audits |

Level Of Care: MassHealth Programs

Service Program: Money Follows the Person Demonstration (MFP...)

Care Program: Money Follows the Person Demonstration (MFP...)

Application Date: 5/28/2024

Received Date: 5/28/2024

Termination Date: Enter date

Status: Active

Reason:

Status Date: 5/28/2024

Start Date: 5/28/2024

End Date: Enter date

## Terminating the MFP Demo Care Enrollment

The ASAP will terminate the MFP Demo Care Enrollment when the individual:

- **MFP Demo – Withdrawn from Demo:** is no longer interested in the MFP Demo, no longer interested in or able to complete the discharge to the community, and signs a Withdrawal Form.
- **MFP Demo – Ineligible for Demonstration:** no longer meets eligibility requirements for the MFP Demo including, but not limited to, transitioning to a non-qualified community residence as outlined above.
- **MFP Demo – Transferred CM Entity:** is transferred to another MFP Demo Case Management Entity (MRC or DDS),
- **MFP Demo – 365 Participation Complete:** has completed 365 days in the community



- **MFP Demo – Death** passes away

Data entry for the termination of the MFP Demo Care Enrollment:

- **Level of Care** = MassHealth Programs
- **Service Program** = Money Follows the Person Demonstration (MFP Demo)
- **Care Program** = Money Follows the Person Demonstration (MFP Demo)
- **Application Date** = Date of signed Informed Consent Form
- **Received Date** = Date of signed Informed Consent Form
- **Termination Date** = Date the consumer is being terminated from the MFP Demo
- **Status** = Terminated
- **Reason** = Choose from one of the Termination reasons notated above
- **Status Date** = Date of signed Informed Consent Form
- **Start Date** = Date of signed Informed Consent Form
- **End Date** = Date the individual terminated from the MFP Demo

Example of a terminated Care Enrollment. *Note:* A termination reason needs to be selected.

Care Enrollment - Money Follows the Person Demonstration (MFP Demo) X

OK | Cancel | Reject Changes | Open Audits |

Level Of Care: MassHealth Programs

Service Program: Money Follows the Person Demonstration (MFP...)

Care Program: Money Follows the Person Demonstration (MFP...)

Application Date: 7/1/2023

Received Date: 7/1/2023

Termination Date: 7/1/2024

Status: Terminated

Reason: MFP Demo - 365 Participation Complete

Status Date: 7/1/2023

Start Date: 7/1/2023

End Date: 7/1/2024

## Activities & Referrals Options

All MFP Demo Activities and Referrals are ***optional*** tracking tools for ASAPs to use as needed. ASAPs that choose to utilize optional MFP Demo actions must create:

- utilization procedures for MFP Demo actions
- procedures must include direction on entering and terminating,
- reporting procedures for monitoring and tracking actions to ensure actions are terminated and utilized according to the ASAP procedure(s)

ASAPs are responsible to ensure good data hygiene on all MFP Demo actions the ASAP chooses to utilize.

### Available Actions:

- **MFP Demo – Follow-up**

This Activity & Referral can be used to track any necessary MFP Demo related follow up.

- **MFP Demo – Service Referral Tracking**

This Activity & Referral can be used to track and monitor the status of MFP Demo specific service (TA, AT, CEN) referrals.

- **MFP Demo – 365 Day Tracking**

ASAP staff are required (if the assigned Case Management entity) to continue tracking the Consumer 365 days post discharge. This Activity & Referral can be used to track the date a consumer has completed their 365 days in the community and the Money Follows the Person Demonstration (MFP Demo) Care Enrollment should be terminated. This date can also be found in the MFP-IS system.

- **MFP Demo – Participation Suspended**

ASAP staff must identify any interruptions from the community stay (ex: Hospitalization or SNF readmission) by updating the MFP-IS system and documenting accordingly in the A&D Journal. This Activity & Referral can be used as a tool to track when the MFP Demo community day count is paused.

## Journal Note Requirements

The following two journal notes are ***required*** when the described events occur:

- **MFP Demo - 24 Hr Back Up Plan Utilization**

ASAPs must track calls received by MFP Demo participants for emergency back-up assistance and the type of assistance needed and document these calls in A&D using the journal type: **MFP Demo - 24 Hr Back Up Plan Utilization.**

Emergency refers to situations that could endanger the health or well-being of a participant and may lead to a critical incident if not addressed. This does not

include informational calls or calls pertaining to complaints. Calls in this category include:

- Transportation to get to medical appointments
  - Life-support equipment repair/replacement
  - Critical health services
  - Direct service/support workers not showing up
  - Other (to be detailed within the journal note)
- **MFP Demo – Critical Incident Reported**  
Use when ASAPs report a Critical Incident to EOEA utilizing the Critical Incident Reporting Portal. The Journal Note reflects that the incident has been submitted to EOEA.

## File Attachment Requirements

Documents for MFP Demo are **required** to be uploaded into the File Attachment section in the folder called Money Follows the Person (MFP). The three sets of documents required to be uploaded into the consumer record are below and should be named as such in the Description section of the File Attachment:

- Informed Consent Form –
  - the naming convention in the Description should be titled **MFP Demo Informed Consent Form**
- Referral Form –
  - the naming convention in the Description should be titled **MFP Demo Referral Form**
- Risk Assessment & Back Up Plan –
  - Both the Risk Level Assessment Worksheet and Risk Assessment Form must be uploaded.
  - Description of file should have standard naming convention titled **{ASAP Abbreviation} + MFP Demo Risk Assessment & Back Up Plan.**
  - Example: TVES MFP Demo Risk Assessment & Back Up Plan A & D screen shot of File Attachment:

## Service Deliveries for MFP Demo Pre-Transition Billing

Once the ASAP has confirmed all required pre-transition steps have been completed, a Service Delivery is **required** to be entered in the Consumer’s record within 30 days for the Pre-Transition Consent & Enrollment.

When creating the Service Delivery for Pre-transition MFP Demo Case Management Tasks, ASAP staff should identify the Agency and Provider as the ASAP enrolling the individual in the MFP Demonstration. The service is **MFP Demo – Pre-Transition Consent & Enrollment**. The Service Month/Year must match the month and year that the informed consent was signed.

Example of a Service Delivery:

Note: ASAPs cannot enter a Service Delivery under another ASAP’s Care Enrollment.

## Service Deliveries for MFP Demo Post-Transition Billing

Once the ASAP has confirmed all required post-transition steps have been completed, a Service Delivery should be entered in the Consumer’s record within 30 days for the Participant Transition & 365 Tracking payment. The post-transition Service Delivery may be entered prior to the MFP Demo Participant’s completion of the full 365-day community period.

Example of a Service Delivery demonstrating the data entry, with service month/year being the month and year the Consumer was discharged into the community. The service is **MFP Demo - Participant Transition & 365 Tracking**.

Days that are spent in a facility following the transition to the community will be added to the 365-day tracking length. Days spent outside of a community setting will not count towards the 365-day tracking requirement of community tenure. For example, if a consumer has spent 10 days in a hospital following their transition to the community, the total tracking will be 375 days (365 days + 10 hospitalization days).

In addition to documentation in A&D and data entry in MFP-IS at initial discharge, ASAP staff are required (if the assigned Case Management entity) to continue tracking the Consumer 365 days post discharge. ASAP staff must identify any interruptions from the community stay (ex: Hospitalization) by updating the MFP-IS system and documenting accordingly in the A&D Journal.

Note: ASAPs cannot enter a Service Delivery under another ASAP’s Care Enrollment.

## Approval and Payment of MFP Demonstration Activities

E-invoicing will be utilized for tracking payment(s) to the ASAP for the initial enrollment and transition. Specific criteria must be met upon review for approval once submitted through E-invoicing system as follows:

- **Enrollment:**
  - MFP-IS record has been created.
  - MFP Informed Consent was signed and recorded in MFP-IS system.
  - MFP Care Enrollment was created in A&D.
  - Risk Assessment/Back up plan has been completed.
  - Service Delivery for **MFP Demonstration – Pre-transition Consent & Enrollment** was created.
- **Transition:**
  - Consumer is confirmed to be transitioned out of the facility to a qualified setting to the community
  - SC-1 form has been submitted and status updated to community.
  - MFP-IS system has been updated with date of discharge.
  - MFP-IS reflects that the consumer is an Approved Participant
  - Service Delivery for **MFP Demo – Participant Transition & 365 Tracking** was created.

Once the service delivery has been completed and it is acknowledged that all necessary steps outlined above have been completed, the ASAP will then use the E-invoicing system to generate an invoice.

The ASAP can submit the Invoice by following these steps:

The **Agency Approver** (E-invoicing role) will first create the invoice:

1. Click *Create Invoice* on the E-invoicing home page
2. Click *Create SIMS Invoice*
3. Select the desired MFP Demo invoice
4. Confirm it matches the Service Deliveries for the month being submitted
5. Click Submit to move the E-invoice to the approval stage

The **Agency Approver** can then move to approve the invoice:

1. Click *My Invoices* on the E-invoicing home page
2. Locate the desired MFP Demo invoice to review and select view under the Commands column
3. Review the invoice and click Approve if accurate to be submitted to EOEA for review.
  - If an error is identified during this step, Agency Approver will notify EOEA staff (contacts at the end of this Business Rule) for invoice deletion.

EOEA staff will identify that an invoice has been submitted and will review A&D to ensure the requirements as outlined are met prior to approving the invoice. In the event that the requirements have not been met, the invoice will be rejected and a notation will be made to identify next steps. The ASAP will correct the errors and re-submit.

## Reporting Responsibilities

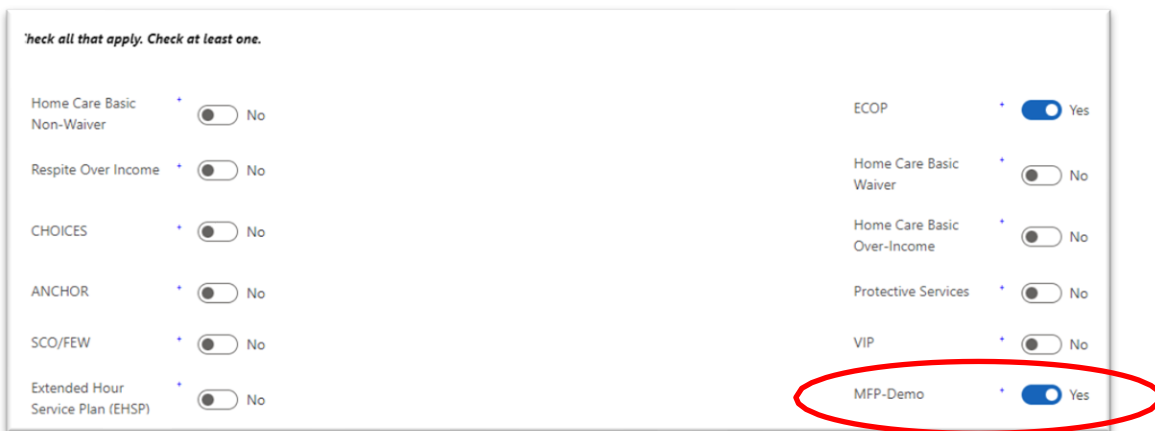
### Report Monitoring:

- ASAP
  - Run Monthly Care Enrollment report out of HAR and reconcile data in MFP-IS to accurately reflect community transitions.
  - Complete MFP Demo Semi-Annual Progress Report every 6 months or as requested by EOEA.
    - Semi-Annual Progress Reporting includes the following topics:
      - Quality Management & Improvement
      - Risk Assessment & Mitigation
      - 24 Hour Back Up Services
      - Housing for Participants
- EOEA – Quarterly and ad hoc

## Critical Incident Reporting

For MFP Demo enrollees, ASAPs are **required** to follow the same protocol outlined in EOEA’s Critical Incident Report (CIR) Instructions. When filing a CIR, the designated ASAP staff must click the box to indicate that the Consumer is enrolled in the MFP Demo among other enrolled programs.

Please see the example screenshot below:



If you have questions regarding this Business Rule, contact MFP Demo Coordinator; Carissa Kushmerek, CTLP Coordinator at [Carissa.Kushmerek@mass.gov](mailto:Carissa.Kushmerek@mass.gov) or Nicholas P. Roberts, Home Care Business Analyst at [Nicholas.P.Roberts@mass.gov](mailto:Nicholas.P.Roberts@mass.gov)