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## User Guide: Short-Term Review Tracking

ASAPS are required to perform Clinical Assessment and Eligibility (CAE) related activities for MassHealth members or applicants seeking approval for MassHealth payment of Community Long Term Services and Supports and Nursing Facility (NF) Services.

ASAP Registered Nurses (RN) conduct clinical eligibility determinations for MassHealth members or applicants seeking admission to a nursing facility (NF) from the community for NF services reimbursed through MassHealth, and for members or applicants admitted to a NF under a payor source other than MassHealth, converting to MassHealth reimbursement.

ASAPs are required to:

- track all Short-Term Reviews (STR),
- conduct all necessary subsequent reviews before the expiration of the Short-Term Approval (STA) date, and
- utilize the Activity & Referral (A&R) functionality within Aging & Disability (A&D) as defined in this business rule.

Tracking STs using an A&R will allow ASAPs to generate reports that assist with:

- Identification of all open STRs & due dates
- Managing workloads
- Scheduling NF visits
- Timely completion of clinical screens

This report includes all CAE consumers who have had a STR action entered for tracking purposes. Report displays when the STR was due, what the status of the STR is currently, when the STR was entered as completed (if applicable), and whether STR complied based on the business rule.

For Short Term Review utilization details, including data entry and monitoring of the required action, please refer to the following documents: Program Instruction **EOEA PI 22-07 Clinical Assessment and Eligibility for Nursing Facility Assessments** and **Tracking Short-Term Reviews in Aging & Disability BUSINESS RULE** located on 800ageinfo at [Business Rule: Tracking Short-Term Reviews in Aging & Disability \(A&D\) - Document Library \(800ageinfo.com\)](#).

## Report Location

The Short-Term Review Tracking Report is available in the HAR Community folder. Login to Report Library using your current WellSky user ID and password.

URL: <https://har4.harmonyis.net/MA/Report%20Library>

Navigate to Report Library>Community>CAE. Open the report titled: Short Term Review Tracking.

## Report Methodology

The Short-Term Review Tracking Report reviews all CAE consumers with a STR action entered.

The date range of report pulls consumers with a STR action due during the date parameters selected (ex: date starting 3/1/2023 and date ending 3/31/2023 will look at all actions with a due date during that time frame for completion).

## Report Parameters

A report runner will select their ASAP to pull all applicable Consumers.

### Agency

Set the ASAP parameter to display your agency.

### Due Date (on or after)

Set this date parameter for the **first** day of the date range requested.

### Due Date (on or before)

Set this date parameter for the **last** day of the date range requested.

## Export to Excel

Select action, then Export the report's output to Excel. The rest of this User Guide will refer to the XLS and its named tables.

## About the dataset

**Tab 1: STR Action Compliance Review (by Month)**

	MONTH DUE:	July 2023	
AGENCY	# On Time	TOTAL	Compliance %

<b>Agency</b>	Lists ASAP selected as parameter as associated with consumer's default agency.
<b>Month</b>	Lists out the Month selected based on date parameters entered. If date parameters span multiple months, Month section will break down by each month involved based on due date of action.
<b># On Time</b>	Displays the number of STR actions that were completed by the due date for the month identified based on date completed of action.
<b>Total</b>	Total number of STR that were due during the month identified
<b>Compliance %</b>	Calculates number of On Time STR actions for the month selected / total number of STR actions due during the month selected.

**Tab 2: Short Term Review Action Status Summary (By Month)**

MONTH DUE:		July 2023				
AGENCY	Client Closed	Completed	In Progress	Not Started	Waiting	Withdrawn

<b>Agency</b>	Lists ASAP selected as parameter as associated with consumer’s default agency.
<b>Month Year</b>	Lists out the Month and Year selected based on date parameters entered. If date parameters span multiple months, Month section will break down by each month involved based on due date of action.
<b>Status</b>	Displays the number of STR actions due during the month based on date parameters and current status.  <b>NOTE: Prior months should be run to ensure status’ have been updated accordingly (ex: locating a STR action that was deferred two months ago but never completed or withdrawn)</b>

**Tab 3: Underlying Consumer Data**

AGENCY	CLIENT ID	CONSUMER FULL NAME	ACTION	SUBJECT	STATUS	REASON	STATUS DATE	DUE DATE	END DATE
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Consumer Data tab includes underlying consumer data for monitoring and review.

<b>Agency</b>	Lists ASAP selected as parameter as associated with consumer’s default agency.
<b>Consumer ID</b>	Unique assigned A&D consumer ID.
<b>Consumer Name</b>	Full name of Consumer.
<b>Action</b>	Displays actions to confirm STR action listed.
<b>Subject</b>	Lists Subject as entered into Action.
<b>Status</b>	Identifies date when the CDS was created in A&D.
<b>Reason</b>	Identifies reason of action as entered into A&D on date report run.
<b>Status Date</b>	Identifies the status date of the action.
<b>Due Date</b>	Identifies the due date of the action
<b>End Date</b>	Identifies the date of completion if applicable.

## Reporting Expectations

ASAPS are required to run a STR tracking report that meets the requirements of this Business Rule, no less than monthly and complete any necessary follow up to ensure timely completion of short-term reviews.

The ASAP is responsible for

- generating reports,
- reviewing for quality assurance,
- identifying inaccuracy trends,
- addressing inaccuracies, and
- completing necessary follow-up within a timely manner.