

COMMUNITY HEALTHCHOICES (CHC)

OPERATIONS MEMORANDUM #2023-10

SUBJECT: When a New Functional Eligibility Determination (FED) is needed for a Home and Community-Based Services (HCBS) waiver application.

TO: Independent Assessment Entity (IAE), Independent Enrollment Broker (IEB)

FROM: Bureau of Policy Development and Communications Management

DATE: November 30, 2023

PURPOSE

Section I-3. A of the IAE Agreement states that the IAE must schedule and complete in-person Functional Eligibility Determinations (FEDs) for applicants of Office of Long-Term Living (OLTL) waiver programs. The IEB Agreement, in Section IV-5. E-2, outlines the expectation of the IEB to coordinate with the IAE to provide timely FED request submittals, process completed FEDs timely, and create a process to follow up on incomplete or missing FEDs.

This Operations Memorandum clarifies when a new FED is required for an HCBS waiver application if an existing FED is already on file and when an existing FED outcome can be used for the HCBS waiver Level of Care Determination.

PROCEDURES

When the IEB receives an application request for HCBS, the IEB will submit a request for a FED from the IAE electronically through the Pennsylvania Independent Assessment (PIA) System.

An existing FED with a NFCE outcome is valid for 12 months from the date it was completed and can be used for an HCBS eligibility determination regardless of whether it originally applied to CHC HCBS, Nursing Facility, or the Living Independence for the Elderly (LIFE) Program.

If the IAE identified that the record contains a FED assessment with a NFCE outcome completed within the last 12 months, that assessment should be forwarded to the IEB through PIA and a new FED assessment is not required.

If the IAE identifies that the record does not contain a FED assessment with an NFCE outcome completed within the last 12 months, a new FED assessment is to be completed by the IAE and returned to the IEB.

Exception: If the NF NFCE FED outcome was determined based on a chart review, the IEB must request a new FED assessment from the IAE. The IAE will conduct a new FED assessment and forward the FED outcome to the IEB through PIA.

NEXT STEPS

1. Review this information with appropriate staff.
2. Contact the OLTL Enrollment Unit if you have questions.