



## TBI Waiver Change in Need Guidance Document

This guidance document was developed to provide additional clarification for TBI Waiver Case Managers regarding their responsibility in addressing program member's change of needs through assessment and service planning. The TBI Waiver Case Manager is responsible to address a member's change in needs. There are certain events that trigger the Case Manager to address the change of needs with a new assessment and service plan. Those situations are outlined in policy, Chapter 512 Traumatic Brain Injury Waiver (TBIW), section 512.13 PERSON-CENTERED ASSESSMENT are as follows:

A new Person-Centered Assessment must be completed when one or more of the following conditions are recorded on the case manager's Monthly Contact Form:

- 1. Member indicated that his/her needs for assistance have changed**
- 2. Member did not use their Personal Attendant Services during that month**
- 3. Member indicated that he/she had problems paying for or getting food, housing, utilities, or medications**
- 4. Recent hospitalization with a change in medical condition resulting in a functional change,**
- 5. Loss of informal supports that assisted with ADLs**
- 6. Decrease in functional ability to complete ADLs**

Changes in a member's needs are to be incorporated into the Person-Centered Service Plan. Case managers are to share any changes in a member's assessment with all service providers listed on the member's Person-Centered Service Plan. The personal attendant provider agency is to share any changes observed in the member with the case manager. A copy of all assessments must be provided to the member and the personal attendant provider agency and the F/EA, if self-directing.

The table below represents a crosswalk between policy and the Case Manager's monthly contact form. This table can assist the Case Manager in determining if a new assessment/service plan should be developed due to a reported change in need.

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Events that require a Change in Need	TBIW Monthly Contact Form Location	TBIW Monthly Contact Form Question
Member's needs for assistance have changed	<b>Question # 4</b>	Have your needs for assistance changed since we last talked? If so, how?
Member did not use their Personal Attendant Services during that month	<b>Question # 1</b>	Did you get all your Personal Attendant Services last month? (ADLs, Community outings, cleaning) If not, then what services did you not receive?
Member indicated that he/she had problems paying for or getting food, housing, utilities, or medications	<b>Question # 7</b>	Are you having any problems paying for or getting food, housing, utilities, or medications?
Recent hospitalization with a change in medical condition resulting in a <b>functional change</b>	<b>Health and Incident Interview</b>	Case Manager notes his/her observation or interview findings
Loss of informal supports that assisted ADLs	<b>Question # 3 &amp;/or # 8</b>	Case Manager notes loss of informal supports
Decrease in functional ability to complete ADLs	<b>Case Manager Observation and/or Health and Incident Interview</b>	Case Manager notes his/her observation or interview findings

Please remember the above events **require** a Change in Need Assessment and Service Plan as outlined in policy. However, a member may express a need that does not rise to the level of a Change in Need Assessment/Service Plan but does require the Case Manager to address it. For example, a member's bathchair broke, the need to repair/replace the equipment can be addressed without a Change in Need Assessment and Service Plan.

When it is necessary for the Case Manager to complete a Change in Need Assessment and Service Plan with their member, the following steps are required:



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### **Step # 1:** Person-Centered Assessment

The Case Manager and the member will review the current Person-Centered Assessment and determine areas /sections of the current assessment that need updating.

The Case Manager will create a **new** Person-Centered Assessment, checking the Change in Needs  box on the top part of the form and complete Section 1: Demographics and the other sections of the assessment that need to be changed due to the member's current situation(s).

### **Step # 2:** Service Plan Addendum

The TBI Waiver Service Plan Addendum form is completed to document a change in the member's needs.

The Case Manager and the member will meet and update the Service Plan by completing a Service Plan Addendum. The Service Plan Addendum is completed based on the updated sections of the **new** Person-Centered Assessment. The Change in Need Service Plan Addendum does not replace a 6 month or annual Service Plan.

If the Change in Need Service Plan Addendum includes *additional units of Personal Attendant Services, or the addition of covered services not currently authorized for the member*, this must be reflected on the Service Plan Addendum and sent to the TBI Waiver fax line at 866-607-9903. Kepro staff will review the information submitted and will generate the UM case (if necessary) in ANG.

**Step # 3:** Copies of the Change in Need Assessment and Service Plan Addendum must be provided to the member and the personal attendant provider agency and the F/EA, if self-directing.

**Step# 4:** The Case Manager is responsible to monitor the implementation of the Service Plan Addendum to ensure that the services are being provided.

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The following case scenario demonstrates the workflow when a Change in Need Assessment and Service Plan Addendum is required.

### Case Scenario-Sally

During a monthly contact with Sally, it was discovered that she had gone to her doctor for a routine check and was sent to the hospital due to her high blood pressure. Sally spent 48 hours in the hospital. She was discharged home diagnosed with uncontrolled hypertension. She reports that she is having more trouble getting herself up and ready in the morning due to dizziness, she has been restricted from driving until her blood pressure is under control and her doctor has prescribed a new medication. She has a follow up appointment in two weeks.

The Case Manager reflects on the Monthly Contact form that Sally's needs have changed due to:

- a.) recent hospitalization ,
- b.) change in her medical condition, uncontrolled hypertension, and
- c.) reported functional changes with her ADLs (needing more help) and IADL (driving restrictions).

### Change in Need Person-Centered Assessment:

The Case Manager and Sally review the current Person-Centered Assessment and determined the following sections need to be updated:

- 3. MEDICAL NEEDS ASSESSMENT**
- 8. GOALS AND CURRENT RESOURCES (MEMBER'S ABILITIES AND SUPPORTS)**
- 9. ADDITIONAL IDENTIFIED PARTICIPANT NEEDS**
- 10. MEDICAL EQUIPMENT NEEDS**

The Case Manager creates a **New** Person-Centered Assessment, indicating that it is a Change in Need, fills in the Demographic section and completes the changes to the sections based on Sally's Change in Need.

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### Service Plan Addendum

The Case Manager and Sally update the Service Plan by completing a Service Plan Addendum. The Addendum addressed Sally's changes, her preferences and change in needs by including the following:

1. Recent Doctor Appointment and Hospitalization: Case Manager to request medical records with Sally's permission from attending doctor and hospital.
2. New medical condition, new medications, and restrictions: List new medications on the Service Plan Addendum, include drug name, dosage/route/ and frequency. Determine formal and informal supports to provide transportation for Sally due to driving restrictions. Sally's sister will take her to the medical appointments, but she will need some help with groceries
3. Change in ADLs and IADLs: Additional support in the home, especially in the morning with an increase in formal supports with Personal Attendant services for three additional hours per day. Add Sally's sister as an informal support for medical appointments. Expand the Personal Attendant tasks to include the essential errand for weekly grocery shopping.
4. Add Service: Personal Emergency Response System due to increased dizziness.

### Sharing the Change in Need Documentation

Sally's Case Manager is responsible to provide copies of the Change in Need Assessment and Service Plan Addendum to her and the personal attendant provider agency or the F/EA, if self-directing.

Sally's Case Manager is responsible to fax the Change in Need documents to Kepro since additional hours and a new service is being requested.

Sally's Case Manager is responsible to monitor the implementation of her Service Plan Addendum to ensure that the services are provided.