

MEDICA GUIDANCE: INITIAL AND ANNUAL IN-PERSON ASSESSMENTS (Effective 11/1/2023)

General Approach: Best practice and Medica’s preference is for care coordinators (CCs) to complete assessments in-person. Certain assessments must always be in-person, as outlined in the table below. In situations where remote assessments are allowed, the first step is always to offer an in-person assessment; if the member declines an in-person assessment, the CC may then complete a remote assessment per the guidance below.

Product/Member Type	Initial Assessment	Annual Assessment	Notes
MSHO/MSC+ EW (no PCA/CFSS) <u>Assessment Tool:</u> MnCHOICES Assessment	In-person	1. Offer in-person assessment 2. If member declines, may complete reassessment remotely via HIPAA secure interactive video or telephone if: a. Prior LTCC/MnCHOICES Assessment was in-person b. Member/legal representative is provided information to make an informed choice between a remote and in-person assessment c. Member/legal representative provides informed consent for a remote reassessment d. CC documents that offered the member/legal representative informed choice regarding method of assessment and member/legal representative’s decision to complete the reassessment remotely 3. Note: All MSHO/MSC+ members receiving EW services must have at least one in-person visit per 12-month period. Consequently, if a member completes a remote assessment in accordance with the above requirements, the CC must complete a separate in-person visit during the same 12-month period.**	If a reassessment is completed remotely, CCs/Delegates must track and document compliance with the remote reassessment requirements and with the annual in-person visit requirement. <u>Initial</u> assessments always must be completed in-person. EW services cannot be started until an in-person assessment has been completed.
MSHO/MSC+ PCA/CFSS <u>Assessment Tool:</u> MnCHOICES Assessment	In-person	In-person	All PCA/CFSS assessments must be in-person. Remote assessments are not allowed. PCA/CFSS services cannot be started until an in-person assessment has been completed and cannot be continued without an annual in-person assessment.***
MSHO/MSC+ Community (non-EW & non-PCA/CFSS) <u>Assessment Tool:</u> MnCHOICES HRA	1. Offer in-person assessment 2. If member declines, may complete assessment remotely via HIPAA secure interactive video 3. If unable to complete assessment via HIPAA secure interactive video, complete via telephone 4. CC must document the assessment method, including the member’s refusal to complete the assessment in-person, as applicable	1. Offer in-person assessment 2. If member declines, may complete assessment remotely via HIPAA secure interactive video 3. If unable to complete assessment via HIPAA secure interactive video, complete via telephone 4. CC must document the assessment method, including the member’s refusal to complete the assessment in-person, as applicable	

Product/Member Type	Initial Assessment	Annual Assessment	Notes
MSHO/MS C+ Institutional <u>Assessment Tool:</u> Medica Institutional HRA & Care Plan	In-person	In-person	
SNBC/I-SNBC Community <u>Assessment Tool:</u> MnCHOICES HRA	<ol style="list-style-type: none"> 1. Offer in-person assessment 2. If member declines, may complete assessment remotely via HIPAA secure interactive video 3. If unable to complete assessment via HIPAA secure interactive video, complete via telephone 4. CC must document the assessment method, including the member's refusal to complete the assessment in-person, as applicable 	<ol style="list-style-type: none"> 1. Offer in-person assessment 2. If member declines, may complete assessment remotely via HIPAA secure interactive video 3. If unable to complete assessment via HIPAA secure interactive video, complete via telephone 4. CC must document the assessment method, including the member's refusal to complete the assessment in-person, as applicable 	
SNBC/I-SNBC Institutional <u>Assessment Tool:</u> MnCHOICES HRA	In-person	In-person	

*Per DHS guidance, effective 11/1/2023, a remote reassessment may substitute for one annual reassessment, followed by an in-person reassessment in the second year for MSHO and MSC+ members receiving EW services but not PCA/CFSS services. After 11/1/2023, delegates/CCs must review past assessments to determine if a person meets the requirements to complete their next reassessment remotely (see 7/18/2023 [DHS e-list announcement](#)).

**All MSHO & MSC+ members receiving EW services must have at least one in-person visit per 12-month period (see 4/4/2023 [DHS e-list announcement](#)). Consequently, if a member completes a remote reassessment per the above guidelines, the CC must complete a separate in-person visit during that same 12-month period.

***See the [Community-Based Services Manual \(CBSM\), Assessment applicability and timelines](#) for additional detail.