PUOP# <u>BUDGET005</u> Revision: <u>1</u>   **Prepared By: <u>KP</u>**
Effective Date: <u>9/17/2007</u>   **Approved By: <u>GDS</u>**

Title: Weekly Case Disposition Report Procedures

Policy: WCFAAA and its contracted lead agencies will communicate routinely in order to
                              ensure referrals and enrollments are handled expeditiously. To outline the
                              methods for communication between the lead agencies and the ADRC to ensure
                              weekly updates to the provider's current enrollment and referral needs.

Purpose: To outline the communication method to be utilized by lead agencies when
                              requesting new enrollments from the ADRC.

Scope: This procedure ensures proper applies to all State General Revenue funded
                              programs [Community Care for the Elderly (CCE), Home Care for the Elderly
                              (HCE) and Alzheimers Disease Initiative (ADI)].

Responsibilities: The lead agencies are responsible for completing the Weekly Case Disposition
                              Report and forwarding the report to the WCFAAA Director of Program
                              Management each Monday with client enrollment, expenditure data and release
                              requests from the waitlist.

                              The Director of Program Management will be responsible for reviewing the
                              provider's Disposition Report. Funding available, consumers will be authorized
                              weekly by the Director of Program management for program eligibility
                              determination and enrollment.

                              WCFAAA Program and Fiscal Department meet at least monthly to discuss
                              provider's surplus/deficit reports and additional consumer enrollments or
                              corrective actions that may be needed.

Procedure:

1. Monthly Targeted Budget
   ❖ Based on agencies current contracted budget, specify monthly targeted expenditures by
      program.
2. Average Care Plan Costs
   ❖ Based on current enrollment counts and expenditures, provide the average care plan
      costs for your agency for each State General Revenue Program.
3. Total Number of Active Clients
   ❖ Report by program current active client count
4. Total Number on Hold
   ❖ Report by program current number of consumers on hold during the week (i.e.
      hospitalization, short-term nursing placement, etc…)
5. Number of Clients Termed
   ❖ Report by program current number of client termed during the week
6. Number of APS High Risk Referrals Received
7. List Disposition of the New Referrals
   a. # On Waitlist APPL
      i. Provide the number of current ADRC Wait List authorized client's that have not yet been
         assessed.

    b. # Opened
       i. Provide the number of current ADRC Wait List authorized client's that have been made active during the week.
    c. # Refusing Services
       i. Provide the number of current ADRC Wait List authorized client's that refused services. The provider is expected to terminate the APPL enrollment line when it is determined that the client will not become an active consumer.

Number of New Referrals Requested:
Indicate the number of Wait Listed client's, by program, that your agency can fund. This must be based on current enrollment and expenditure information. WCFAAA will utilize this information to determine how many clients may be released from the Wait List.

The Director of Program Management will be responsible for reviewing the provider's Disposition Report. Analysis will be conducted utilizing the information provided by the lead agencies, CIRTS APCL enrollments and current projected surplus/deficit information. Based on this analysis the ADRC Waitlist Manager will determine if consumers can be released from the waitlist into funded programs. Funding available, consumers will be authorized weekly following the lead agency request for eligibility determination and potential enrollment on or before Thursday each week.

Attachment:
Weekly Disposition Report (Template)

Revision History:

Revision	Date	Description of changes	Requested By
1	12/27/12	Removal of lead agency requests for Medicaid Waiver enrollments.	Katie Parkinson, Director of Program Management