

NJ Department of Human Services  
Division of Aging Services  
Office of Community Choice Options

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Date: 11/15/2022	Policy Number:
Type: Process	Supersedes: Hospital EARC Screening-HOSPITAL PROCESS, DATED 5/14/2020
TITLE: Hospital Enhanced At-Risk Criteria (EARC) Screening- HOSPITAL PROCESS (Revised)	
Effective Date: Immediately	

Background:
<p>The Hospital Enhanced At-Risk Criteria (EARC) Screening is the process utilized for an individual currently in an acute or long-term acute care (LTAC), non-psychiatric hospital setting who is seeking admittance to a Medicaid Certified Nursing Facility (NF), or Special Care Nursing Facility (SCNF) Ventilator Unit with an expectation of billing NJ Medicaid for all or part of their stay.</p> <p><b>The Hospital EARC, once authorized by OCCO is valid for 10 days and will serve as a 180-day authorization for NF placement, which is contingent upon full clinical and financial Medicaid eligibility within 180 days of admission to the NF as per N.J.AC. 8:85-1.8(b.1.).</b></p> <p>A Hospital EARC (formerly EARC-PAS) <b>is valid as long as no break in service from original admitting NF, if prior EARC authorization date within last 6 months. NOTE:</b> 'No break in service' identifies a NF resident who is returning to the same NF in fewer than 10 days. If the bed-hold days are exhausted, then a new EARC must be conducted.</p> <p>The completion and submission of the Hospital EARC Screening shall be conducted via the EARC Screener Portal. Only discharge planners, who have completed the required training and have received Hospital EARC certification/recertification by the Department of Human Services, will have access to the portal.</p>

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## A. Eligibility Guidelines for the Hospital EARC Screening

### Target Population:

The Hospital EARC Screening process is indicated for individuals who are:

1. Discharging from:
  - a. An acute, non-psychiatric hospital setting; or
  - b. A Long Term Acute Care Unit (LTAC); and
2. New admission to a Medicaid Certified Nursing Facility or Vent SCNF with an expectation of billing Medicaid for all or part of their stay:

**NOTE:** Includes NF residents who have exhausted the 10-day bed hold and will be returning to the same NF upon discharge, and the prior authorized EARC is greater than 180 days (6 months).

  - a. Currently Medicaid eligible but not yet enrolled in NJ FamilyCare with a Managed Care Organization (MCO); or

**NOTE:** MCO enrollment cannot be initiated or changed during hospitalization. The enrollment at time of hospital admission is continued; scheduled enrollment change is deferred to 1st of month after D/C from hospital setting.
  - b. Potentially Medicaid eligible within 180 days.

### Exclusions – NOT ELIGIBLE FOR HOSPITAL EARC, REQUIRES ONSITE OCCO

#### CLINICAL ASSESSMENT:

**NOTE:** Requires submission of completed LTC-4, Referral for Onsite OCCO Clinical Assessment form, available via the EARC Portal, as well as from the DoAS forms website at:  
<https://www.state.nj.us/humanservices/doas/home/forms.html>.

1. Individuals who are being referred for placement in a Special Care Nursing Facility (SCNF):
  - a. AIDS, Behavioral, Huntington's, Neurologically Impaired, Pediatric or TBI;
2. Individuals who are in a Psychiatric Hospital or Psychiatric Acute Care Unit.

### Other Exclusions – NOT ELIGIBLE FOR HOSPITAL EARC or ONSITE OCCO CLINICAL ASSESSMENT:

**NOTE:** The EARC Screener must explore alternative options to nursing facility placement.

1. Individuals who are seeking Home and Community Based Waivers returning to the community;
2. Individuals who would not qualify for Medicaid within 6 months of NF placement who would be considered private pay;
3. Individuals who have a valid PAS on file (full clinical eligibility for Medicaid);
4. Individuals enrolled in NJ FamilyCare with a MCO upon entrance to hospital;

**NOTE:** If MCO enrolled, an authorization for NF placement must be obtained from the MCO.

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5. Individuals pending Medicaid with a valid EARC within last 180 days (6 months) and are returning to the same NF within the 10-day bed hold time period;
6. Individuals whose PASRR Level II determination indicates “Requires Specialized Services”;
7. Individuals who are medically unstable including those in the Emergency Room;
8. Individuals who are not in a NJ hospital.

**IMPORTANT:** Outreach to the applicable Regional OCCO via telephone is necessary for situations outside the parameters of the identified target population or exclusion criteria.

- **Northern Regional Office of Community Choice Options (NRO OCCO):**

**Counties:** Bergen, Essex, Hudson, Hunterdon, Middlesex, Morris, Passaic, Somerset, Sussex, Union and Warren

**Phone:** (732)777-4650

- **Southern Regional Office of Community Choice Options (SRO OCCO):**

**Counties:** Atlantic, Burlington, Camden, Cape May, Cumberland, Gloucester, Mercer, Monmouth, Ocean and Salem

**Phone:** (609)704-6050

## B. Hospital Process

### Creating a NEW EARC Screening

1. The Certified Hospital EARC Screener identifies individuals eligible for the Hospital EARC Screening process as described above, as well as conducting a PASRR Level I as required for NF transfer prior to discharge. If positive, a PASRR Level II is required with a resultant determination prior to initiation of the EARC screening in the portal.


**NOTE:** Federal law (Title 42:483.100-138) mandates that all Medicaid-Certified Nursing Facilities (NF) may not admit an individual with serious mental illness (MI), intellectual, developmental disability (ID/DD) or a related condition (RC) unless the individual has been properly screened, evaluated, and determined to be appropriate for NF placement regardless of payment source.

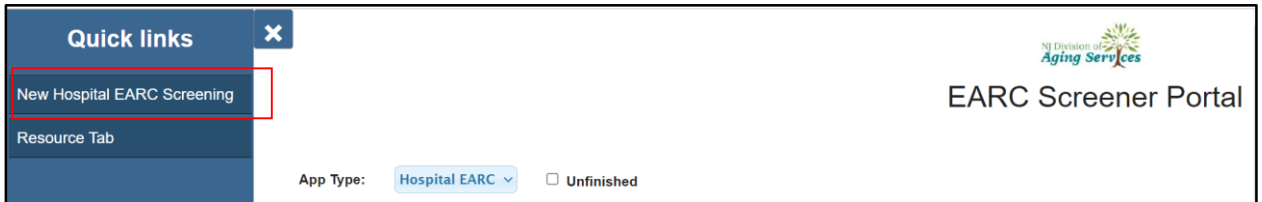
- a. If the PASRR Level I Screen (LTC-26) is positive, the submitted Hospital EARC Screening must be accompanied by the PASRR Level I and Level II determination when applicable as an attachment via the EARC Screener Portal.
- b. No Hospital EARC is to be submitted if the Level II determination indicates a need for Specialized Services.
  - i. This would require the EARC Screener to outreach the respective Level II Authority to request assistance in identifying and accessing specialized services for the individual.

**NOTE:** The most current forms required for the PASRR process can be found at the following websites:

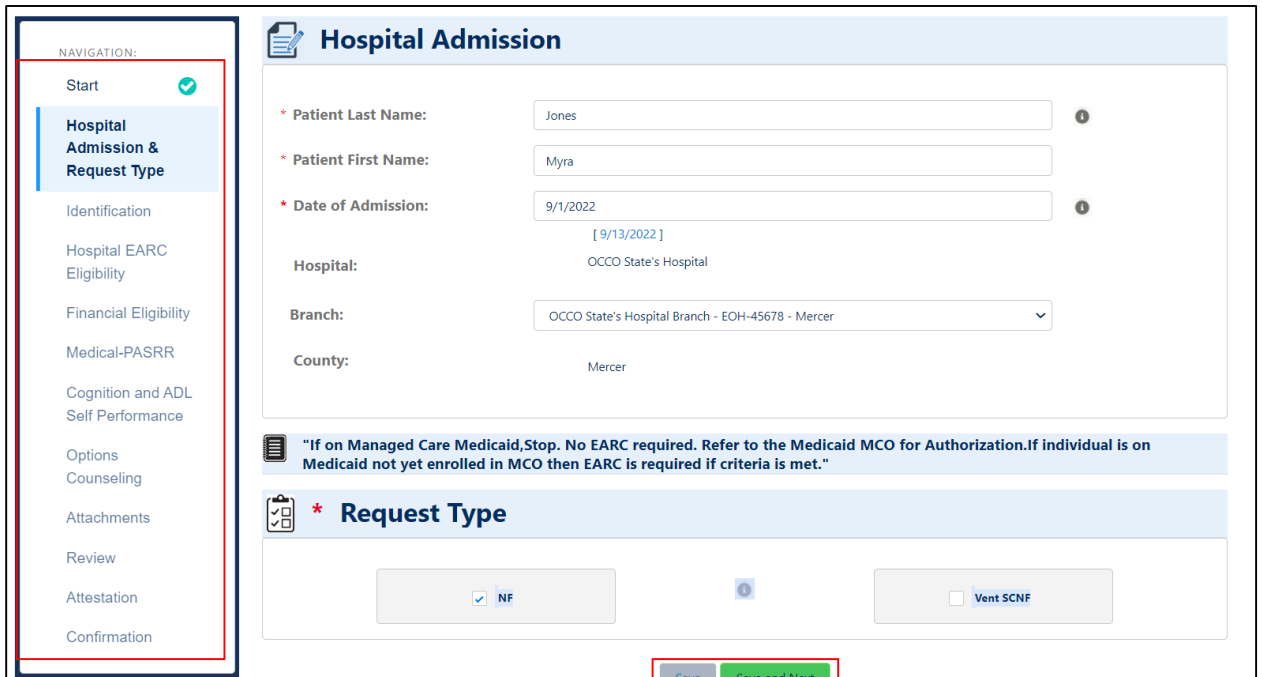
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- PASRR Level I (LTC-26) and Notice of Referral for Level II PASRR (LTC-29):  
<http://www.state.nj.us/humanservices/doas/home/forms.html>
  - DMHAS Categorical Determination form and Level II Psychiatric Evaluation:  
<https://nj.gov/humanservices/dmhas/forms/>
  - (For ID/DD/RC related PASRR needs outreach to the respective DDD Regional Office is necessary – See LTC-26 for contact numbers)
2. Following completion of all PASRR requirements for consideration of a NF transfer, the EARC Screener must access the EARC Portal and fully complete the Hospital EARC Screening.
- a. From the main landing page, click the quick links icon  in the left upper corner, followed by clicking 'New Hospital EARC Screening' to initiate a new EARC.



- b. Following completion of each section, the EARC Screener may choose to 'Save' or 'Save and Next' at which point the application will check for errors that must be corrected prior to proceeding to the next section of the EARC.



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- c. The EARC Screening requires indication of at least one medical diagnosis which is impacting the individual's cognitive and/or physical functioning, as well as required PASRR related detail.

**NOTE:** The use of an ICD code is not appropriate, but rather the EARC Screener must identify the specific diagnosis.

<b>1. * Does the patient have catastrophic illness, a debilitating and/or a chronic illness affecting functional status that may require long term nursing facility stay?</b>	<div style="border: 1px solid #ccc; padding: 2px;">YES</div>
<b>2. * Diagnoses (identify a minimum of one diagnosis):</b> ⓘ	<div style="border: 1px solid #ccc; padding: 2px;">Cerebral Vascular Accident</div> <div style="border: 1px solid #ccc; height: 20px; margin-top: 5px;"></div> <div style="border: 1px solid #ccc; height: 20px; margin-top: 5px;"></div> <div style="border: 1px solid #ccc; height: 20px; margin-top: 5px;"></div>
<b>3. * Is the patient ventilator dependent?</b>	<div style="border: 1px solid #ccc; padding: 2px;">NO</div>

### Pre-Admission Screening Resident Review (PASRR)

Federal law (Title 42L483.100-138) mandates that all Medicaid-Certified Nursing Facilities (NF) may not admit an individual with serious mental illness (MI), intellectual, developmental disability (ID/DD) or a related condition (RC) unless the individual has been properly screened, evaluated, and determined to be appropriate for NF placement regardless of payment source.

**1. Date of Level I PASRR Screen:** ⓘ 

9/13/2022

  
[ 9/15/2022 ]

☐ PASRR Not Applicable

**1a. Level I Screen Outcome:** ⓘ 

Positive ID/DD/RC

**\*If positive, the Level I PASRR must be attached at the time of the EARC-PAS submission along with notification to the Level II Authority(ies) for notification of a Physician Certified 30-Day Exempted Hospital Discharge or referral for a Level II Evaluation and Determination.**

**NOTE:** If the documented Level I Screen Outcome is '**Positive**', additional fields will be required for completion.

**NOTE:** If a '30-day Hospital Exempted Discharge' is indicated, the Level II Determination is not required to be completed prior to NF discharge.

- d. The EARC Screener must continue to the Cognition and ADL Self Performance section, identifying the current functioning of the patient.
- i. The EARC Screener is advised to discuss current functioning with applicable staff and review medical record documentation to identify coding for each required cognition and ADL item.

**IMPORTANT:** As these items are considered for EARC authorization, it is important that all cognition and ADL items be accurately coded to reflect what is actually occurring for the patient.

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**NOTE:** Refer to the EARC INITIAL or RECERTIFICATION training PowerPoints and 'ADL Decision Tree' document for guidance related to coding ADLs.

**NAVIGATION:**

- Start ✓
- Hospital Admission & Request Type ✓
- Identification ✓
- Hospital EARC Eligibility ✓
- Financial Eligibility ✓
- Medical-PASRR ✓
- Cognition and ADL Self Performance**
- Options Counseling
- Attachments
- Review
- Attestation
- Confirmation

**COGNITION and ADL SELF PERFORMANCE**

**Patient:** Myra Jones

1. \* Daily Decision Making: How well does patient make decisions about or-ganizing the day (e.g. when to eat, choose clothes, when to go out)? Minimally Impaired ⓘ

2. \* Short-term Memory: Can patient recall 3 items from memory after 5 minutes? NO ⓘ

3. \* Making Self Understood: How well does patient express or make self un-derstood (expressing information content, however able)? Often Understood ⓘ

4. \* ADL Self Performance (score over past 3 days)  
Assess the individual's ADL Self Performance during the LAST 3 DAYS (except bathing, during last 7 days) considering all episodes of these activities. Determine the 3 most dependent episodes of assistance, then code using the least dependent of those 3 episodes.

4a. Bed Mobility Limited Assistance ⓘ

4b. Transfer Extensive Assistance ⓘ

- e. The EARC Screener must document the Options Counseling detail as required.
  - i. Discussion related to Long-term care supportive services including discharge to the community with referral to the ADRC where appropriate, Medicaid eligibility requirements and alternatives to NF placement shall be communicated, along with the Patient's Choice of Setting (Long Term or Short Term NF placement); and with whom the discussion occurred.
    - a. For those instances where options counseling was not conducted, the EARC Screener must indicate '**Unable to conduct OC**' and document the reason in the open text box.

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- f. If the PASRR Level I outcome is positive, both the PASRR Level I Outcome and Level II determination must be attached in the attachments section prior to EARC submission.
- i. Click **'Attach'** followed by selection of the applicable **'Descriptor'**, then browse computer for the applicable document, and then click the secondary **'Attach'** button. All documents successfully attached will be identified in a grid listing at the bottom of the page.

**NOTE:** All documents must be uploaded as a PDF file type.

Name	Description	Created Date	Status	Delete
PASRR Level II Determination.pdf	PASRR Level II Attachment - ID/DD/RC	09/13/2022	Attached	
PASRR Level I.pdf	PASRR Level I Attachment	09/13/2022	Attached	

- g. Prior to completion of the attestation and submission of the EARC, a REVIEW section will display to provide an opportunity for the EARC Screener to review and edit all detail as inputted.

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- i. To modify any previously inputted detail the EARC Screener may click '**EDIT**' in the applicable section, or simply select the desired section in the left navigation pane. The EARC Screener can then update detail as applicable.

Complete all the steps... 80%Complete

**NAVIGATION:**

- Start ✓
- Hospital Admission & Request Type ✓
- Identification ✓
- Hospital EARC Eligibility ✓
- Financial Eligibility ✓
- Medical-PASRR ✓
- Cognition and ADL Self Performance ✓
- Options

**REVIEW**

**Patient: Myra Jones**

**Hospital Admission** **EDIT**

Patient First Name: Myra Patient Last Name: Jones Date of Admission: 9/1/2022

Name of Hospital: OCCO State's Hospital

Branch: OCCO State's Hospital Branch County: Mercer

**Request Type Information**

NF: ☒ Vent SCNF: ☐

**Identification Information** **EDIT**

- h. Once reviewed and updated if necessary, the EARC Screener must complete the Attestation section, which requires identification of the Screener Name, EARC Screener Certification Number and Telephone contact. Comments may be included to expand on any area not covered in the EARC. If the NF discharge location is known prior to EARC submission, it is requested this detail also be included. The EARC Screener must click '**Save and Submit**' for portal submission to OCCO for processing
- NOTE:** The comments are also utilized for those instances of a work-around for an address verification issue as previously discussed.



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NAVIGATION:

- Start
- Hospital Admission & Request Type
- Identification
- Hospital EARC Eligibility
- Financial Eligibility
- Medical-PASRR
- Cognition and ADL Self Performance
- Options Counseling
- Attachments
- Review
- Attestation**
- Confirmation

**Attestation**

Patient: Myra Jones

By submitting this Hospital EARC Screening Tool, I attest that the information represented is accurate to the best of my knowledge. I have provided counseling to the individual and/or their legal representative on the need to seek Medicaid eligibility at the CWA and discussed discharge options. I also understand that if discharge occurs prior to OCCO authorization date, then the Hospital EARC is not valid.

Name of Certified Hospital EARC Screener: Deanna Freundlich

Hospital EARC Screener Certification No: DEF008458

Telephone Number of Screener: (609) 789-2178

Comments:

Discharge Location: Aristacare at Manchester, 1770 Tobias Ave., Manchester, NJ 08759

Previous Save Save and Submit Cancel Screening

- i. Once submitted, a confirmation window will display providing the EARC confirmation number. The EARC Screener may elect to print a copy of the submitted detail, although no outcome will be indicated since OCCO has not yet processed the EARC.

**NOTE:** If an eventual OCCO Determination is provided, a **pdf copy** of the full submission detail and OCCO Determination will be available in the **Attachments tab** of the record.

Completed 100%Complete

NAVIGATION:

- Start
- Hospital Admission & Request Type
- Identification
- Hospital EARC Eligibility
- Financial Eligibility
- Medical-PASRR
- Confirmation**

**Confirmation Page**

Patient: Myra Jones

YOUR APPLICATION HAS BEEN SUCCESSFULLY SUBMITTED

Note: You may print a copy of the application for your records by clicking on the button below.

Submission of this application does not mean you have immediate coverage.

Your application was submitted on 09/13/2022

Your Confirmation Number is EARC-A00758

Print Application Complete

- i. The EARC Screener will receive an automated portal generated email to confirm the submission, which includes indication of the EARC confirmation

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number and the name of the individual for which the EARC was submitted for.

[EXTERNAL] Sandbox

EARC APPLICATION SUBMISSION NOTIFICATION RE: EARC-A00760

NN

noreply@salesforce.com on behalf of NJSave NoReply <njsave.noreply@dhs.state.nj.us>  
To: Freundlich, Deanna

Wed 9/28/2022 10:17 AM

\*\*\* CAUTION \*\*\*

This message came from an **EXTERNAL** address (njsave.noreply@dhs.state.nj.us\_\_0-8vcjhh27uowgkv@fhvlwrd6sicgjd.r-12z9eai.cs32.bnc.sandbox.salesforce.com). **DO NOT** click on links or attachments unless you know the sender and the content is safe. **Suspicious?**  
Forward the message to spamreport@cyber.nj.gov.

Thank you for your submission of the Hospital EARC for **Myra Jones; EARC-A00760**. No additional information can be added to this referral. If you need to provide additional information, please outreach the respective OCCO to discuss.

**NORTHERN REGIONAL OCCO:** (737)777-4650  
**County coverage area:** Bergen, Essex, Hudson, Morris, Passaic, Sussex, Warren, Hunterdon, Middlesex, Somerset, Union

**SOUTHERN REGIONAL OCCO:** (609)704-6050  
**County coverage area:** Atlantic, Burlington, Camden, Cape May, Cumberland, Gloucester, Mercer, Monmouth, Ocean, Salem

If the referral is unable to be processed by OCCO you will be notified of the inappropriate referral. If any additional information is requested (RFI) you will receive notification of the RFI and must respond within one (1) business day of the request. If no response, the referral will be dismissed.

- j. Click **'Complete'** to return to the main landing page.

**NOTE:** Following completion of a newly submitted EARC, the EARC Screener must refresh the web browser to ensure any instance of a search will also include the newly submitted EARC.

#### Locating 'INCOMPLETE' (Unfinished) EARC Records

In the event an EARC was initiated but not completed with submission to OCCO for processing, the EARC Screener may search for and access this unfinished record as follows:

- k. From the main landing page, check the box that proceeds **'Unfinished'**. This action will cause the page to refresh and auto-highlight the case status of **'Incomplete'**.
- i. In the **'Search By'** area of the landing page, select **'Search All'** to generate a listing of incomplete records, or search by patient name.

- NOTE:** Incomplete records are deleted from the portal following 10 business days if not fully completed and submitted to OCCO.

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	<i>expect Inappropriate Referral status update by OCCO, referral closed.</i>
<b>Is the individual MCO enrolled?</b>	<i>If <b>YES</b>, EARC not appropriate; Requires direct contact with MCO for authorization of discharge to NF; Inappropriate Referral status update by OCCO, referral closed.</i>
<b>Is demographic data correct?</b>	<i>If <b>NO</b>, requires updated demographics or confirmation that demographics as documented are correct; Inappropriate Referral status update by OCCO with expected resubmission by EARC screener for continued processing.</i>
<b>Other considerations?</b>	<i>As documented by OCCO SS; Inappropriate Referral status update by OCCO, referral closed.</i>

**NOTE:** OCCO SS is expected to initiate processing of a submitted EARC within 2 hours of receipt.

### HOLD – Case Status Update

4. If upon receipt by OCCO additional investigation is required prior to processing, the status will be updated to '**Hold**'. No automated email notification or action is required by the EARC Screener at this time.
  - a. This case status will be identified in the grid listing following a search, as well as being indicated in the 'Application Update' tab of the EARC record.

App Type: Hospital EARC ☐ Unfinished

Case Status: Submitted **Hold** Inappropriate Referral Assigned RFI RFI Response OCCO Determination Complete

Search By: Confirmation Number  Search All Clear Search

EARC Deep Search:
 

First Name  Last Name  DOB - MM/DD/YYYY  Submission Date: From - MM/DD/YYYY  To - MM/DD/YYYY

Branch County  Branch Name  Assigned Clinician

Search Current Status Search All Statuses Clear Se

Show 10 entries

App Type	Confirmation	Submitted Date	Last Name	First Name	DOB	Hospital Branch	County	Attachments?	EARC Screener	Region	App S
EARC	EARC-A00760	09/28/2022	Jones	Myra	11/24/1966	OCCO State's Hospital Branch	Mercer	YES	Deanna Freundlich	SRO	Hold

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Application View **Application Update** Attachments View OCCO Determination OCCO Overwrite

Confirmation Number: EARC-A00760 Patient: Myra Jones Provider: OCCO State's Hospital Branch Application Type: EARC

**App Status**

App Status: Hold

OCCO Clinician Assigned: Change OCCO Clinician Assigned: Select Clinician

Showing Page # 1 of 1

App Status	Changed By	Changed Date/Time
Hold	Deanna OCCO Support Staff	09/28/22 10:23 AM
Submitted	Deanna Freundlich	09/28/22 10:17 AM

- b. Once processing can proceed, the case status will be updated as applicable to either **'Inappropriate Referral'** or **'Assigned'**.

#### INAPPROPRIATE REFERRAL – Case Status Update

5. If identified as an **'Inappropriate Referral'**, OCCO SS will identify the reason (e.g., Valid Clinical Assessment on File, MCO Enrolled, Incorrect Data, or Other) and include relevant detail in the comments. This will prompt an automated portal generated email notification, directing the EARC Screener back to the portal to access the EARC record for indication of the reason why the EARC will not be processed.

[EXTERNAL] Sandbox: **EARC APPLICATION INAPPROPRIATE REFERRAL RE: EARC-A00759**

NN noreply@salesforce.com on behalf of NJSave NoReply <njsave.noreply@dhs.state.nj.us>  
To: Freundlich, Deanna Thu 9/15/2022 2:41 PM

**\*\*\* CAUTION \*\*\***

This message came from an **EXTERNAL** address (njsave.noreply@dhs.state.nj.us\_5hq9qgwjfqhe0g6x@o5wq0xdylyim.r-12z9eai.cs32.bnc.sandbox.salesforce.com). **DO NOT** click on links or attachments unless you know the sender and the content is safe. **Suspicious?** Forward the message to spamreport@cyber.nj.gov.

This notice is to inform you that the Hospital EARC submitted for **Myra Jones**; Confirmation **EARC-A00759** cannot be processed at this time. Please proceed to the EARC Screener Portal to review the reason the referral cannot be processed and to determine if any action is required.

If corrections to the original Hospital EARC are necessary and appropriate, you may make corrections followed by resubmission to OCCO.

Should you have any questions, please outreach the respective OCCO to discuss.

**NORTHERN REGIONAL OCCO:** (737)777-4650  
**County coverage area:** Bergen, Essex, Hudson, Morris, Passaic, Sussex, Warren, Hunterdon, Middlesex, Somerset, Union

**SOUTHERN REGIONAL OCCO:** (609)704-6050  
**County coverage area:** Atlantic, Burlington, Camden, Cape May, Cumberland, Gloucester, Mercer, Monmouth, Ocean, Salem

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- a. Search for the EARC record from the main landing page utilizing the case status of 'Inappropriate Referral' or other search criteria and click to open.
- b. Once open, click the '**Application Update**' tab of the record and scroll down to the Inappropriate Referral section to view the reason and related detail.

**Inappropriate Referral Info**

Reason for Inappropriate Referral: MCO Enrolled

Inappropriate Referral Comments: MCO Enrolled with Aetna.

- i. If the reason is identified as '**Incorrect Data**', the EARC Screener must conduct the following for continued processing:
  - a. Click the '**Application View**' tab of the record to review and if necessary, update related demographics as requested by OCCO, followed by clicking '**Save**' to save any changes; click '**Reload**' at the top of the page to refresh the record.

**Application View** Application Update Attachments View OCCO Determination OCCO Review

**Identification Info**

Patient First Name: John Patient Last Name: Matthew

Date of Birth: 2/3/1948 Gender: Male

Patient Age: 71 SSN: 758-99-8757

Where did the patient live at time of admission?: Homeless Facility:

**Address**

Address 1: 852 White Horse Pike

Address 2 / Apt #:

City: Hammononton

State: NJ

Zip Code: 08037

County of Residence: Atlantic

- i. If upon verification, the originally inputted demographic detail is correct, return to the '**Application Update**' tab of the record, scrolling to the bottom of the page to the Inappropriate Referral section to insert a comment, such as '**[Demographic] information validated; no changes made.**'

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Inappropriate Referral Info

Reason for Inappropriate Referral:

Incorrect Data

Inappropriate Referral Response Comments:

Please review SSN and update if necessary.

Inappropriate Referral Comments:

SSN validated as correct, no changes conducted.

Save

- b. Return to the **'Application Update'** tab of the record to return the case status to **'Submitted'**'; followed by clicking **'Save'** for continued OCCO processing.

**NOTE:** Once resubmitted, the date of the EARC referral is then reset to the date of the resubmission

App Status

App Status

Submitted

OCCO Clinician Assigned:

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App Status	Changed By	Changed Date/Time
Submitted	Deanna Freundlich	10/27/22 10:20 AM
Inappropriate Referral	Deanna OCCO Support Staff	10/27/22 10:09 AM
Submitted	Deanna Freundlich	10/27/22 10:06 AM

<< < > >>

- c. If any other Inappropriate Referral - Reason is identified, the EARC record is closed and no additional action by the EARC Screener is required; the EARC will remain in this status. This will also apply where any instance of Incorrect Data has not been responded to by the EARC Screener.

### ASSIGNED – Case Status Update

6. If the EARC referral can be processed, OCCO SS will update the case status to **'Assigned'** along with indication of the **'OCCO Clinician'** to proceed with an OCCO review.

**NOTE:** At any point, the current case status of the EARC record will be identified within the grid listing after conducting a search, as well as identified within the 'Application Update' tab of the EARC record.

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Application View **Application Update** Attachments View OCCO Determination OCCO Overwrite close

Confirmation Number: EARC-A00760 Patient: Myra Jones Provider: OCCO State's Hospital Branch Application Type: EARC

App Status

App Status: Assigned

OCCO Clinician Assigned: Deanna Freundlich

Change OCCO Clinician Assigned: Deanna Freundlich

App Status	Changed By	Changed Date/Time
Assigned	Deanna OCCO Support Staff	09/28/22 10:30 AM
Hold	Deanna OCCO Support Staff	09/28/22 10:23 AM
Submitted	Deanna Freundlich	09/28/22 10:17 AM

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7. Once assigned, the OCCO Reviewer will conduct a review of the submitted EARC to determine if the required eligibility criteria are met.
  - a. The OCCO Reviewer will update the case status as applicable to '**RFI**' or '**OCCO Determination**'.

#### RFI (Request for Information) – Case Status Update

8. If the Reviewer identifies a coding error; a need for PASRR or other documentation, the OCCO Reviewer will update the status to **RFI (REQUEST FOR INFORMATION)**, prompting an automated portal generated email notification to the EARC Screener.


**NOTE:** *The RFI must be responded to within one (1) business day.* If no response, a final **OCCO Determination** of '**Referral Dismissed**' will be noted. If the EARC is still required, creation of a new EARC will be necessary.



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**[EXTERNAL] Sandbox: EARC Application Request For Information (RFI) Notification RE: EARC-A00760**

 noreply@salesforce.com on behalf of NJSave NoReply <njsave.noreply@dhs.state.nj.us>  
To: Doucet, Nicole; Freundlich, Deanna  
Wed 9/28/2022 10:37 AM

**\*\*\* CAUTION \*\*\***

This message came from an **EXTERNAL** address (njsave.noreply=dhs.state.nj.us\_\_0-6ftlg9psvbxnex@lby2usjlcy8dc.r-12z9eai.cs32.bnc.sandbox.salesforce.com). **DO NOT** click on links or attachments unless you know the sender and the content is safe. **Suspicious?**  
Forward the message to spamreport@cyber.nj.gov.

This notice is to inform you that the Hospital EARC submitted for **Myra Jones**; Confirmation **EARC-A00760** requires additional information as requested by the OCCO Reviewer. Please proceed to the EARC Screener Portal to review the details of this request for information (RFI).

**This RFI must be responded to within one (1) business day. If no response, the EARC referral will be dismissed, at which point you will receive a notification of dismissal.** If a Hospital EARC is still required, it will be necessary to submit a new EARC.

Should you have any questions, please outreach the respective OCCO to discuss.

**NORTHERN REGIONAL OCCO:** (737)777-4650  
**County coverage area:** Bergen, Essex, Hudson, Morris, Passaic, Sussex, Warren, Hunterdon, Middlesex, Somerset, Union

**SOUTHERN REGIONAL OCCO:** (609)704-6050  
**County coverage area:** Atlantic, Burlington, Camden, Cape May, Cumberland, Gloucester, Mercer, Monmouth, Ocean, Salem

- a. The EARC Screener must access the applicable EARC record, 'Application Update' tab, scrolling down to view the detail of the RFI as documented by the OCCO Reviewer.

Application View **Application Update** Attachments View OCCO Determination close

App Status	Changed By	Changed Date/Time
RFI	Deanna OCCO Support Staff	09/28/22 10:37 AM
Assigned	Deanna OCCO Support Staff	09/28/22 10:30 AM
Hold	Deanna OCCO Support Staff	09/28/22 10:23 AM
Submitted	Deanna Freundlich	09/28/22 10:17 AM

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**RFI Info**

<input checked="" type="checkbox"/> Request For Information (RFI)	RFI Comments:	ADL coding issue identified. Please review and modify if necessary, otherwise, include comment with response to identify coding validated as entered.
Original Screener	Deanna Freundlich	RFI Respondee

- b. If modification to previous detail is required, the EARC Screener must access the 'Application View' tab of the record and make revisions as applicable. All items will be open for potential revisions. If any revisions are made, the EARC Screener must click 'Save', followed by clicking 'Reload' to refresh the record.

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The screenshot shows the 'Application View' tab of the EARC Screener. The '4. ADL Self Performance (score over past 3 days)' section is highlighted with a red box. It contains five items: 4a. Bed Mobility, 4b. Transfer, 4c. Locomotion (indoor/outdoor), 4d. Dressing (Upper and/or Lower Body), and 4e. Eating. Each item has a dropdown menu to its right, all of which are set to 'Limited Assistance' or 'Extensive Assistance'.

- c. If PASRR or other documentation is required, the EARC Screener must access the '**Attachments View**' tab of the record to attach requested documentation followed by closing the record to return to the main landing page.
- i. Select '**Choose File**' to browse computer for applicable attachment, followed by indicating a description of the attachment. Click '**Save Attachment**' to apply to record.

The screenshot shows the 'Attachments View' tab of the EARC Screener. The 'Attachments View' tab is highlighted with a red box. Below the header, there is a section for 'Attach File: \*' and 'Description: \*'. The 'Attach File' section has a 'Choose File' button and a text input field containing 'PASRR Level II Determination.pdf'. The 'Description' section has a text input field containing 'ID/DD PASRR Level II Determination'. A green 'Save Attachments' button is at the bottom left.

- d. For any instance of an update to the EARC record, once the EARC Screener returns to the main landing page a **Refresh of the web browser** is required to ensure the updates are applied to the record.

**IMPORTANT:** Any required revision to the EARC record must occur prior to the case status update to 'RFI Response'. Failure to first make updates as necessary will cause the record to be inaccessible for any further updates.

### RFI RESPONSE – Case Status Update

9. Once the EARC detail is updated in response to the RFI and the browser is refreshed on the main landing page, the EARC Screener must click into the '**Application Update**' tab.
- a. Update the App Status to '**RFI Response**', scroll down to the RFI section to indicate the **Name of the RFI Respondee**, insert a comment in the '**RFI Respondee Comments**' if necessary; followed by clicking '**Save**'. The RFI Response date and time will auto-populate at the point of save.
- NOTE:** If coding is validated and no changes are made to the record, insert a '**RFI Respondee comment**' to indicate '[Cognition/ADL] coding verified as accurate', or

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something to this effect to alert the OCCO Reviewer that a review was conducted without changes.

The top screenshot shows the 'Application Update' tab in the OCCO interface. It displays fields for Confirmation Number (EARC-A00760), Patient (Myra Jones), Provider (OCCO State's Hospital Branch), and Application Type (EARC). The 'App Status' dropdown is set to 'RFI Response'. The OCCO Clinician Assigned is Deanna Freundlich.

The bottom screenshot shows the 'RFI Info' section. It includes a 'Request For Information (RFI)' checkbox, 'RFI Comments' (ADL coding issue identified. Please review and modify if necessary, otherwise, include comment with response to identify coding validated as entered.), 'RFI Respondee' (Deanna Freundlich), 'RFI Respondee History', and 'RFI Respondee comments' (ADL coding validated, no changes made.). The RFI Date/Time is 9/28/2022 10:37 AM.

**NOTE:** Updating the case status to 'RFI Response' alerts OCCO that a response has been provided, therefore enabling the OCCO Reviewer to continue the review process for a final OCCO Determination.

## OCCO DETERMINATION – Case Status Update

10. If the OCCO Reviewer is able to proceed with the review, a final **OCCO Determination** will be made, prompting an automated portal generated email notification to the EARC Screener.

The email notification is titled '[EXTERNAL] Sandbox: EARC FINAL OCCO DETERMINATION NOTIFICATION RE: EARC-A00760'. It is from noreply@salesforce.com on behalf of NJSave NoReply <njsave.noreply@dhs.state.nj.us> to Freundlich, Deanna. The email contains a caution message and a notice about the final OCCO determination for Myra Jones. The notice states that the Hospital EARC submitted for Myra Jones: Confirmation EARC-A00760 has been reviewed by OCCO and a final determination provided. Please proceed to the EARC Screener Portal to review the final OCCO determination so that you may conduct next steps related to this patient's discharge planning.

- a. The EARC Screener must access the applicable record and click the '**OCCO Determination**' tab of the record to view the details of the OCCO Determination.

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- i. If **AUTHORIZED** the EARC Screener may proceed with the patient's discharge to the NF; providing printed copies of both – the EARC Screening with OCCO Determination (available in 'Attachments View' tab of EARC record), and the PASRR Level I and Level II determination as applicable.

**NOTE:** An authorized HOSPITAL EARC is **valid for 10 days** from the date of authorization. If discharge to the NF does not occur within by day 10 of the authorization, a new EARC must be completed. **Medicaid payment for the NF stay may be provided for up to 90 days, which is contingent upon full clinical and financial eligibility within 90 days of admission to the NF as per N.J.AC. 8:85-1.8(b1.).**

- ii. If **NOT AUTHORIZED**:

1. OCCO SS will assign the referral to an OCCO Assessor, who will complete an on-site clinical assessment within 3 business days of initial receipt of the submitted Hospital EARC Screening.
2. The patient is not to be discharged from the hospital to a Medicaid Certified NF until an onsite clinical assessment is conducted by an OCCO Assessor and the individual is approved for NJ Nursing Facility Level of Care.
  - a. If '**APPROVED**', the OCCO Assessor will forward via email the Nursing Facility Authorization letter (LTC-13). The patient can then be transferred to a NF with required documentation, including the LTC-13 and PASRR Level I and Level II as applicable.
  - b. If '**DENIED**', the OCCO Assessor will verbally notify the Hospital Discharge Planner of the denial as well as provide the individual/legal representative with information related to the denial and discuss the appeal process. Alternatives to NF placement will be discussed. The Hospital Discharge Planner shall initiate

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Options Counseling on placement alternatives to facilitate discharge to an appropriate setting.

- i. A copy of the Denial Packet, including the Nursing Facility Level of Care Denial Letter (LTC-14) will be mailed to the individual/legal representative as directed by the individual/legal representative.
- c. If '**REFERRAL DISMISSED**', the EARC Screener must review reason for dismissal – No response to RFI, PASRR Level I or Level II, or other reason as indicated.
  - i. If an EARC is still indicated, requires EARC Screener to initiate and submit a new Hospital EARC; otherwise, no additional action required.


#### ADMINISTRATIVE ACTION – OCCO Determination

**IMPORTANT:** An **Administrative Action** may occur for which select OCCO management may modify a previously inputted OCCO Determination for one of two reasons:

- Additional information has been received, requiring modification to the final OCCO Determination; or
- The determination was documented in error, requiring modification to reflect the appropriate OCCO Determination.

This administrative action will prompt an *URGENT* automated portal generated email notification to the EARC Screener to inform of this administrative action.

**[EXTERNAL] Sandbox: URGENT: Notification of Modified OCCO Determination**

 **noreply@salesforce.com on behalf of Deanna Freundlich <deanna.freundlich@dhs.state.nj.us>**  
To: Doucet, Nicole; Freundlich, Deanna  
Wed 9/28/2022 12:13 PM

**\*\*\* CAUTION \*\*\***

This message came from an **EXTERNAL** address ([deanna.freundlich@dhs.state.nj.us](mailto:deanna.freundlich@dhs.state.nj.us) [34wkqg9k4by7poi9@85z6w0245g2p.r-12z9eai.cs32.bnc.sandbox.salesforce.com](mailto:34wkqg9k4by7poi9@85z6w0245g2p.r-12z9eai.cs32.bnc.sandbox.salesforce.com)). **DO NOT** click on links or attachments unless you know the sender and the content is safe. **Suspicious?**  
Forward the message to [spamreport@cyber.nj.gov](mailto:spamreport@cyber.nj.gov).

**IMPORTANT:** This email is to inform you that the OCCO Determination for **Myra Jones**; Confirmation Number **EARC-A00760** has been modified to reflect a new determination.

**This modification invalidates any prior notification of an OCCO Determination.** It is important that you return to the EARC portal to review the related detail. If notification to other parties of the prior OCCO Determination has occurred, it is your responsibility to notify those parties of this modification.

Any questions should be directed to the respective OCCO:

**NORTHERN REGIONAL OCCO:** (732)777-4650  
**County coverage area:** Bergen, Essex, Hudson, Morris, Passaic, Sussex, Warren, Hunterdon, Middlesex, Somerset, Union

**SOUTHERN REGIONAL OCCO:** (609)704-6050  
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The EARC Screener must locate and open the applicable record and view the updated determination in the '**OCCO Determination**' tab of the record.

Application View Application Update Attachments View **OCCO Determination** OCCO Overwrite close

OCCO Determination Updated

**OCCO DETERMINATION UPDATED:**  
The OCCO Determination has been modified effective 09/28/2022. This modification invalidates any prior notification.

☐ Authorized - Valid through ☐ NF ☐ Vent SCNF

☒ Not Authorized

Referral Dismissed - Reason:

This modification was necessary for the following reason:

☒ Additional information has been received, requiring modification to the final OCCO Determination.

☐ The determination was documented in error, requiring modification to reflect the appropriate OCCO Determination.

**NOTE:** This modification is the final OCCO Determination and invalidates any prior notification. It is the responsibility of each entity that utilized and shared the prior determination information to notify all involved parties of the modified and updated determination. Any questions should be directed to the respective OCCO Office.

Name of OCCO Administrator Deanna Freundlich  
Date of OCCO Change 9/28/2022 [ 9/28/2022 ]

It is important to note that this action is a final OCCO Determination and invalidates any prior notification. It is the responsibility of each entity that utilized and shared the prior determination information to notify all involved parties of the modified and updated determination.

## COMPLETE – Case Status Update

11. Following a case status update of OCCO Determination, OCCO SS will finalize all back-end processing and update the record status to '**Complete**'.
  - a. The EARC record is now closed and no further processing is required; unless an Administrative Action is required as discussed above.

## Printing EARC Records

Any individual being discharge to a NF with a valid EARC shall be accompanied with a copy of the 'Authorized' EARC, as well as a copy of PASRR Level I and Level II determination when applicable.

- To access a .pdf copy of the EARC, the EARC Screener must locate and open the applicable record; followed by clicking into the '**Attachments View**' tab.
- Locate the EARC with determination .pdf file and click the print icon. The file may be saved as a .pdf or printed as necessary.

Application View Application Update **Attachments View** OCCO Determination OCCO Overwrite close

Confirmation Number: EARC-A00760 Patient: Myra Jones Provider: OCCO State's Hospital Branch Application Type: EARC

Attach File: \* Choose File No file chosen

Description: \*

Save Attachments

Name	Description	Created Date
AppConfirmation.pdf	Confirmation PDF	09/28/2022

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## C. OCCO Process

### Support Staff (SS) Process

1. Designated OCCO SS shall monitor the OCCO Worker Portal, Submitted status tab for new Hospital EARC submissions.

**NOTE:** OCCO SS is expected to review a submitted EARC and update the status within 2 hours of receipt for continued processing.

2. Upon identification of a new EARC submission, SS shall query the Molina database to determine if the patient is MCO/PACE enrolled and/or whether a current clinical eligibility assessment is on file.

**NOTE:** SS is not responsible for monitoring for PASRR compliance; this is to be conducted by the OCCO Reviewer at the time of their review.

- a. If upon receipt further investigation is required prior to OCCO processing, the status is to be updated to **Hold** and will remain in this status until processing can occur. (e.g., need to confer with management prior to any further status updates)
- b. If demographic detail appears to be incorrect for which upfront processing cannot occur, update the status to **Inappropriate Referral**, Reason: **Incorrect Data**, as well as a comment to indicate the demographic detail that appears in error.
  - i. The EARC Screener will have the opportunity to make corrections and return the status to **Submitted** for continued processing if applicable. Otherwise, no further action by the SS is required.
- c. If the individual is identified as MCO enrolled, update the status to **Inappropriate Referral**, Reason: **MCO Enrolled**, as well as a comment to indicate the MCO the patient is enrolled in.

Inappropriate Referral Info	
Reason for Inappropriate Referral:	<div>MCO Enrolled</div>
Inappropriate Referral Comments:	<div>MCO Enrolled with Aetna.</div>

**NOTE:** If a MCO enrollment was scheduled to occur while the individual is hospitalized, the MCO enrollment will not occur. The Molina (Managed Health Care Screen) posting is not considered valid and the HOSPITAL EARC should be processed. If uncertain, seek guidance from the Office Supervisor or Administrative Manager.

- d. If there is a valid clinical eligibility assessment on file (within the last year) or the individual is FFS in a NF prior to 7/1/2014 (SPC 65, 66 or 67) and has had no break in NF placement; expecting to return to the same NF, update the status to **Inappropriate Referral**, Reason: **Valid Clinical Assessment on File**, as well as a comment to indicate the date of the assessment and when applicable, indication of Fee for Service.



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**NOTE:** For any instance of Inappropriate Referral, the EARC Screener will automatically be provided an email notification regarding this status update. Only where Incorrect Data identified will the EARC Screener have an opportunity to resubmit for processing. This would require the EARC Screener to make necessary corrections then return the status to **Submitted** to return to OCCO for processing.

3. If the EARC Screening is accepted, update status to **Assigned** and indicate the name of the OCCO Reviewer; as well as inputting the referral into Molina.

**Molina Coding:**

- a. Referral Date: [Date EARC Screening received]
  - b. Location Code: E
  - c. Action Date: blank
  - d. Action Code: blank
  - e. Assessor ID: [Reviewer ID]
4. SS shall monitor the OCCO Worker Portal for status – **OCCO Determination** for final processing.
    - a. If **Authorized**:
      - i. Update Molina:
        1. Comment: “EARC Authorized thru [10 calendar days from authorization]”
        2. Action code: 2 or 1 (Vent SCNF)
        3. Action Date: [date of determination]
      - ii. Update EARC Screening status to **Complete**.
    - b. If **Not Authorized**:
      - i. SS assigns the referral to the OCCO Assessor in TeleSys for an on-site OCCO PAS:
        1. Status 1 (Referral type): EARC
        2. Status 5 (Program): New
        3. Status 7 (Clinician): (as applicable)
        4. Referral date: [date EARC received]
        5. Facesheet Notebook: “EARC dated [date of received referral] not authorized, assigned for onsite clinical assessment”
      - ii. SS updates EARC PAS line in Molina:
        1. Action Code: D
        2. Action Date: [date of determination]
        3. Add a new PAS line with clinician number and Location Code H.
      - iii. Update EARC screening status to **Complete**.
      - iv. SS (or Reviewer) will send an email to the assigned Assessor to notify that an on-site hospital PAS has been assigned, including the due date (within 3 business days of the original HOSPITAL EARC referral).
    - c. If **Dismissed**:
      - i. Update Molina PAS line for dismissal:
        1. Action Code: S



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2. Action Date: [date of determination]
  - ii. Update EARC screening status to **Complete**.
5. In the event of an **Administrative Action** for which a modification has been made to a prior OCCO Determination, the SS must process this new outcome as indicated.
  - a. If the EARC screening was documented as Complete at the time of the Administrative Action, the AM will update the status to **OCCO Determination** to alert SS to the need for updated Molina entry.
    - i. SS must update EARC screening status to **Complete** following this Molina update.

### OCCO Reviewer Process

1. The Reviewer shall monitor the OCCO Worker Portal for newly assigned Hospital EARCs.
2. Upon review, if the Reviewer identifies a need for clarification, a coding issue, or requires submission of additional documentation (i.e., PASRR Level I and/or Level II determination), update EARC status to **RFI** (Request for information), including a comment to indicate the detail specific to the request.

**NOTE:** For any instance of RFI, the EARC Screener will automatically be sent an email notification regarding this status update. The EARC Screener must respond to the RFI with the required information within 24 hours, changing the status to **RFI Response** to return to OCCO for continued review.

  - a. The Reviewer shall monitor the OCCO Worker Portal for updated Hospital EARC status of **RFI Response** for which the EARC Screener has responded to.
  - b. If the EARC Screener does not reply to the request within 24 hours, the Review make an OCCO Determination of **Dismissed**, with indication of the reason for the dismissal.

**NOTE:** The EARC Screener will automatically be sent an email notification regarding this final OCCO Determination. If an EARC is still required, the EARC Screener must initiate a new EARC.
3. If a final OCCO Determination can be made, the Reviewer will identify the applicable outcome; indicate their Reviewer name, Date of Review and any additional comments that may be relevant.
  - a. If **Authorized**, select NF or SCNF which should coincide with the request type and indicate Date of Authorization.

**NOTE:** Authorization is valid for 10 days; current hospital admission only.
  - b. If **Not Authorized**, include detail as necessary to inform EARC Screener of the reason for this determination.
    - i. The Reviewer sends an email to OCCO SS assigned to the portal to inform of the need for an EARC Not Authorized reassessment by OCCO, including the following detail – Name of patient, Hospital EARC Not Authorized, PASRR Level I and Level II outcome as applicable, the date of the determination.

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- ii. Reviewer (or SS) will send an email to the assigned Assessor to notify that an on-site hospital PAS has been assigned, including the due date (within 3 business days of the original HOSPITAL EARC referral).
  - c. If **Dismissed**, include reason for dismissal, PASRR Level I, PASRR Level II, RFI not responded to, or Other; and detail related to the dismissal as necessary.  
**NOTE:** Following an OCCO Determination, the EARC Screener will automatically be sent an email to indicate that a final OCCO Determination has been made. The SS will finalize the Molina entry as indicated and update the status to **Complete**.
4. If additional information is presented by the EARC Screener that prompts a need for modification to the OCCO Determination or the Reviewer indicates an OCCO determination in error, the Reviewer must immediately bring this information to the attention of the Administrative Manager or other designee who has the ability to take Administrative Action to modify the OCCO determination.

#### Administrative Action by Administrative Manager or other Designee

1. For instances for which an OCCO Determination was documented but requires modification, the Administrative Manager or other designee must access the EARC Screening within the portal to take **Administrative Action**. This may include instances of:
  - a. Additional information received which impacts the original OCCO Determination, requiring modification, or
  - b. An OCCO Determination documented in error.**NOTE:** This Administrative Action may occur for any EARC Screening sitting in a status of OCCO Determination or Complete.
2. The AM must access the EARC Screening and modify the determination within the OCCO Determination tab.
3. If the EARC Screening status was identified as Completed, the AM must update the status to **OCCO Determination** to enable communication of this change to the OCCO SS for modification of the prior Molina entry to reflect the modified OCCO Determination.  
**NOTE:** This action will prompt an URGENT Email Notification to the EARC Screener to inform of this administrative action. It is important to note that this action is a final OCCO Determination and invalidates any prior notification.

#### OCCO Assessor Process:

1. For instances where the HOSPITAL EARC is not authorized, the OCCO Assessor conducts the on-site clinical eligibility assessment within 3 business days of the original HOSPITAL EARC referral as per SOP.