**ADvantage Program Referral Process**

### AAU: Resource Center
- Completes UCAT I / Intake & Referral Form with the applicant or authorized representative by phone.

### OKDHS: OKDHS County Office determines financial eligibility of applicant (within 45 days).

### AND

### HCBS Unit:
- OKDHS Nurse dispatched to applicants home to complete initial UCAT III and determine medical eligibility (within 20 days of receipt).
- Member preference (if any) for Case Management Agency and Home Care Agency documented on ADv1.

### OKDHS:
- Referral agency or OKDHS county office Social Services Specialist completes UCAT I with the applicant or authorized representative.

### CM Agency:
- Case Manager assigned by CM Agency

### OKDHS:
- Determines financial eligibility of applicant (within 45 days).

### HCBS Unit:
- Home Care RN assigned by Homecare Agency

### CM Agency:
- Reviews UCAT and plans Interdisciplinary Team Meeting (IDT) with Member and Home Care RN

### AAU:
- New Cases prepares Authorization Packet designating CM and Home Care agencies chosen by the Member or selected by AAU round robin process

### OKDHS:
- Applicant is determined to be eligible

### OKDHS:
- Applicant is determined to be ineligible

### AAU:
- AAU New Cases prepares Authorization packet designating CM and Home Care agencies chosen by the Member or selected by AAU round robin process

### OKDHS:
- Applicant in writing of determination of ineligibility, reason for determination, and right to request a fair hearing via the local OKDHS Office if in disagreement with an action taken regarding Medicaid services. Applicants are also advised that they may reapply at any time and as often as they want.

### LEGEND
- **AAU** = ADvantage Administration Unit
- **OKDHS** = Oklahoma Department of Human Services
- **ASD / HCBS Unit** = Aging Services Division’s Home & Community Based Services Unit
- **UCAT** = Uniform Comprehensive Assessment Tool
- **CM** = Case Management
- **HC** = Home Care
- **PCA** = Personal Care Assistant
- **SPA** = Service Plan Authorization Unit

Reassessment:
- CM Agency: Case Manager completes new UCAT, conducts IDT meeting, and submits Service Plan annually to continue Member’s Services.

### CM Agency:
- Case Manager reviews UCAT and plans Interdisciplinary Team Meeting (IDT) with Member and Home Care RN

### HC Agency:
- Home Care RN meets with Member and completes Nursing Assessment / Monitoring Form prior to IDT Meeting

### CM Agency:
- Case Manager assigns a new ADv6g and Service Plan to Member and Home Care Agency

### OKDHS:
- Home Care RN assigned by Homecare Agency

### CM Agency:
- Case Manager facilitates IDT Mtg. with Member, Home Care RN, and any others approved by Member (i.e. family, friends, home health agency, hospice, etc.) to develop service plan and update UCAT as needed.

### CM Agency:
- Case Manager writes service plan; reviews entire plan with Member obtaining confirmation that Member does or does not agree with service plan, advises Member of their rights to a fair hearing, obtains confirmation that the Member has made free choice, obtains Member’s signature, and submits to AAU Service Plan Authorization Unit (SPA) for processing.

### AAU SPA Unit:
- Processes service plan and sends ADv6g to Agencies. SPA Unit may assign Conditions or Service Plan Reviews (SFR-ADv6g) to specific service lines.

### OKDHS/ASD

**November 2010**