



**JEB BUSH
GOVERNOR**

MEMORANDUM

TO: AAA Executive Directors **NOTICE#:** 062504-1-T-SWCBS

FROM: Ronald Taylor, Director
Division of Statewide Community-Based Services

DATE: June 23, 2004

SUBJECT: Notice of Transmittal: Medicaid Waiver Specialist Monitoring Tools

**TERRY F. WHITE
SECRETARY**

The purpose of this Notice of Transmittal is to provide the Medicaid Waiver (MW) Specialists tools to assist in monitoring the Aged and Disabled Adult (ADA) and Assisted Living for the Elderly (ALE) waiver programs. There was discussion regarding the need for monitoring tools at the June and December 2003 Medicaid Waiver Specialist meetings.

Last summer, the Centers for Medicare and Medicaid Services (CMS) conducted a compliance review of the Medicaid waivers. To address some of the issues noted in the review, specifically those related to client file documentation, Department staff developed the attached client file review forms. The Medicaid Waiver Specialists are encouraged to use these forms. However, if staffs already have tools that ensure review of the elements and content included in the tools, there is no need to switch. Our goal is simply to assist the Area Agencies on Aging in ensuring compliance. We recommend the MW Specialists share the client file review tools with the case manager supervisors. The case manager supervisors should use the checklists when reviewing samples of the case managers' files.

The attached client file review tools will be presented at the Medicaid Waiver Specialist Training Meeting. In the mean time, if you have questions, please contact your contract manager.

Attachments

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