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EDMUND G. BROWN JR.  
Governor

**Office of AIDS  
Medi-Cal Waiver Program Section**

**All Project Directors' Letter  
Letter Number: MCWP 17-03**

**DATE: May 23, 2017**

**SUBJECT: CHANGES TO CLIENT REASSESSMENT TIMEFRAMES AND NEW MONTHLY SERVICE PLAN MONITORING REQUIREMENT**

Pursuant to the 2017-2021 §1915(c) Home and Community-Based Services AIDS Waiver approved on March 27, 2017, by the Centers for Medicare and Medicaid Services (CMS), modifications have been made to the client reassessment and care plan review timeframes, and requires a monthly contact with clients.

### **Client Reassessments and Care Plan Review**

Effective May 1, 2017, client reassessments are now required every 180 days or sooner if a client's need changes. These reassessments include nursing, psychosocial, cognitive functional ability (CFA), nursing facility level of care, and ongoing resource evaluations. Care service plan reviews and interdisciplinary team case conferences are also concurrently required every 180 days. The new timeframe has changed from the previous 90-day reassessment requirement in prior AIDS Waivers.

### **Monthly Service Plan Monitoring**

Case managers are required to monitor client service plans each month through face-to-face or telephonic contact. Monitoring activities must be documented in the client chart. Documentation must include the date and time of each attempt to contact the client, any changes in client need, changes in the service plan, and verification that client is receiving services in the type, scope, frequency, duration, and quantity described in the service plan and progress towards service plan goals. Monthly contact attempts may be made by the nurse case manager, social work case manager, or both.

### **Transition**

MCWP staff will evaluate compliance with these new procedures beginning May 1, 2017. For the period of January 1, 2017 through April 30, 2017, consideration to client contact intervals shall be given during an onsite compliance review.



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If you have questions regarding this notice, please contact Drew Young, Health Program Specialist at (916) 449-5881 or email at [drew.young@cdph.ca.gov](mailto:drew.young@cdph.ca.gov).

Sincerely,

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California Department of Public Health