

Title *	<input type="text"/>
SSN	<input type="text"/> Caller's SSN
Last Name	<input type="text"/> Caller's Last Name
First Name	<input type="text"/> Caller's first name
Conduent Specialist *	(select) Name of Conduent staff who answered or made the call
LOCET #	<input type="text"/> LOCET ID number (from OPTS)
Informant	<input type="radio"/> self <input type="radio"/> spouse <input type="radio"/> child or child-in-law <input type="radio"/> other relative <input type="radio"/> non-relative <input type="radio"/> other health care professional <input type="radio"/> qualified hospital representative (for NF admission) <input type="radio"/> qualified nursing facility representative (for NF admission) <input type="radio"/> other person (for NF admission) Relationship of the caller to the applicant
Call recording was complete *	<input checked="" type="radio"/> Yes, the entire call was available for audio review <input type="radio"/> No, portion(s) of the call were not available for audio review (describe below) <input type="radio"/> No, the entire call was not available for audio review (describe below) Call recording was complete and available for audio review
Conduent QA Analyst *	(select) Name of Conduent QA nurse who reviewed this LOCET recording
OAAS Reviewer	Carol Denny Name of OAAS Quality staff who reviewed Conduent's QA of this LOCET
Q1 Medicaid eligibility checked / referral made if necessary	<input checked="" type="radio"/> Yes <input type="radio"/> No, state reason below <input type="radio"/> N/A Specialist verified Medicaid eligibility in MMIS and referred to local Medicaid office if applicable.
Q1 "no" reason	<input type="text"/> Explain why OAAS reviewer disagrees with Conduent QA nurse on this item.
Q2 Demographic Information	<input checked="" type="radio"/> Yes <input type="radio"/> No, state reason below <input type="radio"/> N/A Specialist verbally verified demographic information, provided a 'read back' for accuracy and updated OPTS and LOCS as necessary.
Q2 "no" reason	<input type="text"/> Explain why OAAS reviewer disagrees with Conduent QA nurse on this item.
Q3 OCDD Protocol	<input checked="" type="radio"/> Yes <input type="radio"/> No, state reason below <input type="radio"/> N/A Applied and documented OCDD referral protocol accurately.
Q3 "no" reason	<input type="text"/> Explain why OAAS reviewer disagrees with Conduent QA nurse on this item.
Q4 Provided Program Choice Information	<input checked="" type="radio"/> Yes <input type="radio"/> No, state reason below <input type="radio"/> N/A Specialist explained and provided program choice information and basic eligibility criteria for each program CCW,LT-PCS,ADHC (includes priority slot offer if hospitalized in the last 30 days when applicable), PACE, and NF.
Q4 "no" reason	<input type="text"/> Explain why OAAS reviewer disagrees with Conduent QA nurse on this item.
Q5 Clarification of program choice given if needed	<input checked="" type="radio"/> Yes <input type="radio"/> No, state reason below <input type="radio"/> N/A Specialist clarified client's program choice and repeated explanations of programs if needed.
Q5 "no" reason	<input type="text"/> Explain why OAAS reviewer disagrees with Conduent QA nurse on this item.
Q6 Setting the Stage read and understanding verified	<input checked="" type="radio"/> Yes <input type="radio"/> No, state reason below <input type="radio"/> N/A Specialist read Setting the Stage as required, and verified informant's understanding of the statements.
Q6 "no" reason	<input type="text"/> Explain why OAAS reviewer disagrees with Conduent QA nurse on this item.
Q7 Information to Collect documented correctly	<input checked="" type="radio"/> Yes <input type="radio"/> No, state reason below <input type="radio"/> N/A Specialist documented Information to Collect accurately (informant name, relationship to applicant for LOCET type).
Q7 "no" reason	<input type="text"/> Explain why OAAS reviewer disagrees with Conduent QA nurse on this item.
Q8 Documented Information Sources accurately	<input checked="" type="radio"/> Yes

No, state reason below

N/A

Specialist inquired and documented information sources accurately.

Q8 "no" reason

Explain why OAAS reviewer disagrees with Conduent QA nurse on this item.

Q9 ADL descriptions were asked

Yes

No, state reason below

N/A

When ADL questions were asked, the Specialist included, "Describe how...", all subtasks, and look back periods.

Q9 "no" reason

Explain why OAAS reviewer disagrees with Conduent QA nurse on this item.

Q10 Early Loss ADLs coded correctly

Yes

No, state reason below

N/A

Early Loss ADLs (bathing, dressing, hygiene), and locomotion are coded correctly.

Q10 "no" reason

Explain why OAAS reviewer disagrees with Conduent QA nurse on this item.

Q11 LLADLs coded correctly

Yes

No, state reason below

N/A

Late Loss ADLs (eating, transferring, toileting, and bed mobility) are coded correctly.

Q11 "no" reason

Explain why OAAS reviewer disagrees with Conduent QA nurse on this item.

Q12 Probing effective, responses clarified, and no leading questions for PW 1

Yes

No, state reason below

N/A

Probing was effective, responses were clarified, and no leading questions were asked for PW 1.

Q12 "no" reason

Explain why OAAS reviewer disagrees with Conduent QA nurse on this item.

Q13 Read-back of answers for NF LOCET was accurate

Yes

No, state reason below

N/A

Read back of answers for nursing facility LOCET was performed accurately for all ADLs.

Q13 "no" reason

Explain why OAAS reviewer disagrees with Conduent QA nurse on this item.

Q14 Uninformed Informant handled properly

Yes

No, state reason below

N/A

Uninformed informant was handled appropriately.

Q14 "no" reason

Explain why OAAS reviewer disagrees with Conduent QA nurse on this item.

Q15 Questioning was accurate for PW 2, 3, 4, 5

Yes

No, state reason below

N/A

Questions were asked accurately in the following sections: Cognitive Performance, Behavior, Mental Health Problem/Condition, Physician Involvement, Treatments & Conditions, Skilled Rehab.

Q15 "no" reason

Explain why OAAS reviewer disagrees with Conduent QA nurse on this item.

Q16 Coding was accurate for PW 2, 3, 4, 5

Yes

No, state reason below

N/A

Questions were coded accurately in the following sections: Cognitive Performance, Behavior, Mental Health Problem/Condition (included hallucination and delusion LOCET NB entry), Physician Involvement, Treatments and Conditions, Skilled Rehab.

Q16 "no" reason

Explain why OAAS reviewer disagrees with Conduent QA nurse on this item.

Q17 Probing effective, responses clarified, no leading questions for this PW 2, 3, 4, 5

Yes

No, state reason below

N/A

Probing was effective, responses were clarified, and no leading questions were asked for PW 2, 3, 4, 5

Q17 "no" reason

Explain why OAAS reviewer disagrees with Conduent QA nurse on this item.

Q18 Service Dependency: Specialist question read and coded accurately

Yes

No, state reason below

N/A

Service Dependency: Specialist read the question in its entirety and coded accurately.

Q18 "no" reason

Explain why OAAS reviewer disagrees with Conduent QA nurse on this item.

Q19 Appropriately asked, probed, and documented Care Giver information correctly.

Yes

No, state reason below

N/A

Specialist appropriately asked, probed, and documented Care Giver information correctly.

Q19 "no" reason

Explain why OAAS reviewer disagrees with Conduent QA nurse on this item.

Q20 ITC asked, documented and coded correctly

- Yes
- No, state reason below
- N/A

ITC questions were asked accurately, and answers are documented and coded correctly (excluding Care Giver question - addressed in another question).

Q20 "no" reason

Explain why OAAS reviewer disagrees with Conduent QA nurse on this item.

Q21 ITC probing effective, responses clarified and no leading questions

- Yes
- No, state reason below
- N/A

Probing was effective, responses were clarified, and no leading questions were asked for ITC section excluding Care Giver.

Q21 "no" reason

Explain why OAAS reviewer disagrees with Conduent QA nurse on this item.

Q22 Referral to community resources made and documented in LOCS

- Yes
- No, state reason below
- N/A

Specialist referred to community resources (ADRC, COA, other community supports, etc.) and accurately documented referrals in LOCS.

Q22 "no" reason

Explain why OAAS reviewer disagrees with Conduent QA nurse on this item.

Q23 Inquiry made about programs and facility residence

- Yes
- No, state reason below
- N/A

Specialist inquired and documented accurately if applicant has: SSI (if applicable), VA, Medicare (if applicable), responsible representative (if applicable), and if applicant (community caller only) is living in a nursing home or other type of facility at the time of the LOCET call.

Q23 "no" reason

Explain why OAAS reviewer disagrees with Conduent QA nurse on this item.

Q24 ALS questioning done and documented in LOCET NB

- Yes
- No, state reason below
- N/A

Specialist inquired if applicant was informed by physician if he/she is diagnosed with ALS, and if yes, documented in LOCET NB.

Q24 "no" reason

Explain why OAAS reviewer disagrees with Conduent QA nurse on this item.

Q25 LOCS and OPTS updated LOCET and programs requested

- Yes
- No, state reason below
- N/A

Specialist added the LOCET, LOCET type, and all requested programs in LOCS and OPTS.

Q25 "no" reason

Explain why OAAS reviewer disagrees with Conduent QA nurse on this item.

Q26 ALS, ADHC Priority Slot documented accurately

- Yes
- No, state reason below
- N/A

Specialist documented ALS, ADHC Priority Slot accurately, when applicable.

Q26 "no" reason

Explain why OAAS reviewer disagrees with Conduent QA nurse on this item.

Q27 Informed physical address required for person in women's shelter

- Yes
- No, state reason below
- N/A

Specialist documented in LOCS the applicant residing in a women's shelter was informed a physical address is required before the LTPCS program choice can be opened (if applicable).

Q27 "no" reason

Explain why OAAS reviewer disagrees with Conduent QA nurse on this item.

Q28 HIV/AIDS diagnosis documented appropriately

- Yes
- No, state reason below
- N/A

Specialist documented in LOCS (only) the applicant's decision to disclose HIV/AIDS diagnosis (if applicable).

Q28 "no" reason

Explain why OAAS reviewer disagrees with Conduent QA nurse on this item.

Q29 Phone etiquette maintained

- Yes
- No, state reason below
- N/A

Specialist met phone etiquette requirements throughout the management of the phone interview.

Q29 "no" reason

Explain why OAAS reviewer disagrees with Conduent QA nurse on this item.

Q30 Distressed or angry caller handled appropriately

- Yes
- No, state reason below
- N/A

Specialist handled distressed or angry caller, or escalated call to supervisor.

Q30 "no" reason

Explain why OAAS reviewer disagrees with Conduent QA nurse on this item.

Q31 Call "hold" protocol handled appropriately

- Yes
- No, state reason below
- N/A

Specialist asked caller if call can be placed on hold, complied with hold time requirements, and thanked caller for holding.

Q31 "no" reason

Explain why OAAS reviewer disagrees with Conduent QA nurse on this item.

Q32 Adhered to internal call transfer protocol

- Yes
- No, state reason below
- N/A

Internal Call Transfer: Specialist provided explanation and provided required closing statement prior to transfer.

Q32 "no" reason

Explain why OAAS reviewer disagrees with Conduent QA nurse on this item.

Q33 No results given

- Yes
- No, state reason below
- N/A

Specialist did not provide assessment results at any time during the call.

Q33 "no" reason

Explain why OAAS reviewer disagrees with Conduent QA nurse on this item.

Q34 Explained expectations and next steps

- Yes
- No, state reason below
- N/A

Specialist explained what to expect after the completion of the LOCET and referred those calling for NF placement to refer to their protocol (may also provide the OAAS NF staff phone number)?

Q34 "no" reason

Explain why OAAS reviewer disagrees with Conduent QA nurse on this item.

Q35 Appropriate closing remark made

- Yes
- No, state reason below
- N/A

Again my name is...is there anything else I can help you with?

Q35 "no" reason

Explain why OAAS reviewer disagrees with Conduent QA nurse on this item.

Comments which do not relate to existing items. No deficiencies given.

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