

# Level One Screen Companion Guide



Connections to better living

*Designed to assist those who conduct the Level One Screen to determine likely eligibility for long-term community support options*



NHCarePath is New Hampshire's "front door" to quickly connect individuals to a full range of community services and supports.



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## **INTRODUCTION**

The Level One Screen is intended to determine a person's potential eligibility for Medicaid-funded long-term community-based services and supports. In addition to Medicaid services and supports, the screening tool will help identify a full spectrum of options based on an individual's needs and goals. The information that a person provides in the screen is confidential and will only be shared with other agencies with the person's permission.

This Companion Guide provides information to assist in administering and completing the Level One Screen for both in-person and phone interviews by providing instructions, tools, and resources for the screener to successfully conduct the interview.

### **Level One Screen Content**

The Level One Screen asks questions that guide the screener to potential referral options, including whether someone is likely eligible for Medicaid-funded community-based services and supports. When introducing the Level One Screen to an individual, the screener will discuss confidentiality and may request permission to share the provided information with potential referral agencies. The individual will need to sign and date a release form before any information can be submitted to a referral agency.

### **Who Should Complete a Level One Screen?**

The Level One Screen is designed to be used for anyone who needs long-term services and supports, including but not limited to, veterans, adults, older adults, children, and individuals with a brain injury, mental illness, or a developmental/intellectual disability.

In an effort to ensure an effective screening process, it is important to understand a person's story from their perspective. People who conduct the Level One Screen are in a unique position to assist individuals in finding them the help they need to live successfully in their community.

### **Who Conducts the Level One Screen?**

The Level One Screen may be self-administered online through [nheasy.nh.gov](http://nheasy.nh.gov). The Level One Screen may also be conducted by No Wrong Door (NWD) Core Partner staff through an in-person or phone interview either electronically or paper-based.

### **Important Information about the Level One Screen**

While it is not necessary to ask every question listed on the Level One Screen, it is important to ascertain the specific services the inquirer needs and desires to make appropriate referrals.

The Level One Screening questions should be utilized to determine if an individual may need long-term services and supports. This screen is not intended to be utilized for every inquiry an agency may receive.

More in depth screening for financial and clinical eligibility may be available online at the NH Easy website, [www.nheasy.nh.gov](http://www.nheasy.nh.gov)

## **GLOSSARY OF TERMS AND DEFINITIONS**

### **No Wrong Door (NWD)**

The No Wrong Door (NWD) System improves access to long-term services and supports by creating a standardized, streamlined enrollment process. This statewide network of organizations works together to provide eligibility coordination to help guide people through the application process and to assure that individuals seeking services have a common experience regardless of which NWD partner they initiate contact with.

### **NH's NWD Core Partners**

- Community Mental Health Centers
- Area Agencies on Developmental Disabilities
- ServiceLink Aging and Disability Resource Centers
- NH Department of Health and Human Services, Division of Client Services

### **Health Insurance Exchange**

The Health Insurance Exchange is a marketplace to review current healthcare coverage, affordability and comparability of plans, and enroll in healthcare plans such as NH Health Protection Plan.

### **NH Health Protection Plan**

The NH Health Protection Program (Medicaid expansion) allows many low-income individuals to enroll in health insurance plans at little or no cost. This is a program of NH Department of Health and Human Services. These two programs include the Health Insurance Premium Payment Program (HIPP) and the Bridge Program.

### **Level One Screener**

The Level One Screener is a staff member at a NWD Core Partner site.

### **Inquirer**

The inquirer is the person who is being interviewed. The inquirer may be an individual in need of long-term services and supports, or their spouse, child, friend, or other involved party. If a person is referred to another agency, only the individual or a legally authorized representative can authorize the release of information.

### **Triggers**

Triggers are defined as information, events or situations, as described by the inquirer, that indicate that he/she is requesting or is in need of information about long-term support and service options.

### **Likely Eligibility**

Likely eligibility is defined as the possibility of being eligible. The Level One Screen *does not* determine a person's actual eligibility for supports and services. Only NH Department of Health and Human Services (NH DHHS) can determine eligibility for Medicaid and other types of publicly-funded long-term services and supports.

## **TRIGGERS/INDICATORS**

There are many triggers that indicate a person may benefit from a Level One Screen. Listed below are potential triggers/indicators that may cause a screener to consider conducting a Level One Screen:

- Inquiries related to long-term care support needs
- Looking for nursing home or assisted living placement
- Person transitioning from hospital or nursing facility to home and needing coverage for long-term services and supports.
- Individual with an intellectual disability/developmental disability (ID/DD) who is looking for services and supports in the community
- Parent of a child who is in need of long-term care services and supports
- Inquiry about Medicaid
- Individual expressing concerns about care at home
- Concerns that a physical or mental disability is interfering with performing daily activities
- Planning for future care
- Recent significant change in circumstance
- Individual with a mental health condition who is looking for services and supports in the community
- Individual with an acquired brain injury who is looking for services and supports in the community

### **Person might say:**

- My parent needs help to remain living in my home, and I don't have enough money to pay for services
- I have Medicaid and need help to stay in my home
- I think my mom needs to go into a nursing home or assisted living facility
- I am caring for my parent/spouse, and I need help
- I don't have health insurance
- I have a medical condition and I need help to stay in my home
- I have a mental health condition that makes it difficult to concentrate or complete my daily tasks
- I can't afford my Medicare supplemental plan anymore
- I can't take care of my parent/loved one anymore
- I need help caring for my child
- There is no support at home and mom/dad needs help
- Someone told me I should apply for Medicaid

### **Examples:**

- ✓ My mother is being discharged from the hospital. She cannot return to her apartment as it does not accommodate her needs. The hospital social worker is assessing her for residential placement.

- ✓ My son is turning 21 and has been in special education. What services are available for him once he leaves school?
- ✓ I lost my job and have been having a hard time concentrating and getting through the day. I have no income or insurance. Are there services that could help me?
- ✓ I am currently a resident of a nursing home and want to return to the community, but I have nowhere to go and no one to help me.
- ✓ I am the guardian of my granddaughter and I cannot take care of her anymore. I need help.

## **CONDUCTING THE SCREEN**

***Screener:***

Good morning/afternoon, my name is \_\_\_\_\_. How may I help you today?

***Inquirer:***

Answers

**Note:** *The screener listens closely to identify triggers that would indicate they should conduct the Level One Screen. If you are unclear about the situation, ask the inquirer probing questions.*

***Screener:***

Based on what you are telling me, I believe that you might benefit from services. I am going to ask you some questions that are designed to evaluate your needs (or the needs of the person you are inquiring about) to see what services you might be eligible for. Depending on your answers, I will provide you with information on possible options and information on next steps that might help you. At this time, would you like to share your name? If not, at any time during this process, please feel free to share. I will ask you again at the end of this interview.

**Note:** *“Might be/likely eligible” is not a promise or guarantee of eligibility. It is important that the inquirer understands that the screener does not determine eligibility.*

*The Level One Screen begins with some basic questions that will help inform the screener about the inquirer.*

***Screener:***

**Q1: Who are you seeking information or care for?**

The screener checks the box in accordance with the answer

**Note:** *Depending on answer, screener will respond appropriately. Example: If inquiring for self, screener will ask “Are you,” etc. If inquiring for someone else, the screener will ask “Is the person you are inquiring about,” etc.*

**Q2: What is your (or the person you are inquiring about) date of birth?**

The screener writes in the date

**Q3: What town do you (or the person you are inquiring about) live in?**

The screener writes in the name of the town

**Q4. Have you ever served in the Military?**

The screener checks “Yes” or “No” in accordance with answer. If an individual indicates that he or she served, you should direct them to additional resources listed in Section 3 of this guide.



*The next questions are a series of functional queries that screen for a medical condition that would suggest a person may be eligible for Medicaid-funded community LTSS.*

**Q5: Do you (or the person you are inquiring about) have a medical or physical condition that results in your need for daily assistance with two or more activities such as getting in and out of bed, dressing and bathing, eating, managing medications, or using the toilet, etc.?**

The screener checks “Yes” or “No” in accordance with answer

**Q6: Do you (or the person you are inquiring about) have, or think you might have, a mental health condition that makes it difficult for you to concentrate or complete your daily tasks?**

The screener checks “Yes” or “No” in accordance with answer

**Q7: Do you (or the person you are inquiring about) have or think you might have an intellectual disability, cerebral palsy, epilepsy, autism or a specific learning disability, or any other condition closely related to an intellectual disability?**

The screener checks “Yes” or “No” in accordance with answer

**Q8: Have you (or the person you are inquiring about) experienced an injury to the brain as a result of a traumatic brain injury; lack of oxygen to the brain following surgery, a near drowning, a heart attack, stroke, or other event; exposure to toxic substances; a disease or disorder that affects the brain; a brain tumor; or other traumatic event?**

The screener checks “Yes” or “No” in accordance with answer

**Q9: What are your (or the person you are inquiring about) most pressing needs?**

The screener checks all needs that apply in accordance with answer

**Note:** *The Screener may need to clarify questions by providing explanation or examples to ensure that the inquirer understands the questions.*

*The final two questions are intended to identify likely financial eligibility for Medicaid-funded long-term services and supports. Insurance questions may identify a need for referral to the Health Insurance Exchange. The screener can ask the following questions or can direct the inquirer to the NH Easy website to complete a more in-depth financial eligibility screen.*

**Screener:**

**Q10: At this time, are your resources (bank accounts, personal property, retirement account, etc.) at or below \$2,500 for an individual or \$4,000 for a couple?**

The screener checks “Yes” or “No” in accordance with answer.

**Note:** *If the inquirer does not wish to answer financial question, assist them by:*

- *Offering instructions on how to access NH Easy and the process for determining financial eligibility so that he/she can input information in private.*

**OR**

- *Offering to guide them through the online process to determine eligibility.*

**Q11: What is/are your (or the person you are inquiring about) insurance resources?**

The screener checks all that apply

# REFERRAL PROCESS

## Interpreting the Level One Screen

The information collected on the Level One Screen is the first step in creating a picture of the care needs of the whole person.

The diagram below maps the referral flow based on answers to the screening questions.



## **If Level One Screen Shows Likely Financial and Functional Eligibility and Person is Currently Enrolled in Medicaid...**

The inquirer is already enrolled in Medicaid and does not need to complete a Medicaid application. However, they do need to complete the community LTSS eligibility process.

- **Step 1:** If inquirer is likely eligible for services from your agency, follow your agency's protocol.
- **Step 2:** Depending on the inquirer's service needs, they may need to be referred to another NWD Partner for community LTSS. Look at the above chart to determine which partner the inquirer needs to be referred to. The screener should complete a referral form, including appropriate signature, and send to partner agency; or screener can provide contact information for appropriate provider if that is the inquirer's preference.
- **NOTE:** The screener can offer person-centered counseling to explore community living options through the inquirer's local ServiceLink office.

### ***Screener could say:***

Based on the medical and financial information you provided, it appears that you (or the person you are inquiring about) is already enrolled in Medicaid, however, you may be eligible for community long-term services and supports.

- Are you interested in learning more about your options regarding community LTSS? If yes, refer to appropriate partner. If no, refer for community options counseling.

## **If Level One Screen Shows Likely Financial and Functional Eligibility and Person is NOT Currently Enrolled in Medicaid.....**

The inquirer may need to complete the Medicaid application AND/OR may need to complete the community LTSS eligibility process in addition.

- **Step 1:** If inquirer is likely eligible for services from your agency, follow your agency's protocol.
- **Step 2:** If inquirer is likely eligible for services from a partner agency, depending on inquirer's preference, screener can offer to assist with online Medicaid application, referral to District Office, or referral to partner agency.
- **Step 3:** If inquirer needs to be referred to another NWD Partner for community LTSS, screener should complete a referral form, including appropriate signature, and send to partner agency; or screener can provide contact information for appropriate provider if that is the inquirer's preference.
- **NOTE:** The screener can offer person-centered counseling to explore community living options through the inquirer's local ServiceLink office.

### ***Screener could say:***

Based on the medical and financial information you provided, it appears that you (or person you are inquiring about) might be eligible for Medicaid or other financial programs.

- Are you interested in applying for Medicaid? Would you like me to make a referral? (If yes, determine application process preference. If no, refer for community options counseling.)

- Are you interested in learning more about community LTSS to help with your needs? (If yes, refer to appropriate partner. If no, refer for community options counseling.)

### **If Level One Screen Shows **NOT Likely Financially or Functionally Eligible...****

The inquirer may choose to complete a Medicaid application because the Level One Screen does not offer an in-depth evaluation of a person's eligibility. Or, the inquirer may choose not to complete a Medicaid application. In either case, the inquirer is eligible for person-centered counseling to explore community living options.

- **Step 1:** Depending on inquirer's preference, offer referral to ServiceLink. Referral can be made using a referral form or screener can provide contact information so that inquirer can follow up on their own.
- **NOTE:** Screener can also provide information about information available on websites (see Helpful Resource list at the end of this guide) if the inquirer prefers to explore independently.

#### ***Screener could say:***

- Based on your responses to these questions you (or person that you are inquiring about) are eligible for person-centered counseling. Person-centered counseling can help you:
  - Access and make connections to resources you need to make informed choices and live independently in your community;
  - Access family caregiver information and supports;
  - Explore your future care, evaluate pros and cons of specific choices, and develop an action plan based on what is important to you; and
  - Understand and access Medicare and other medical insurance options.
- There are a number of non-Medicaid-funded community services and supports that may help you with your needs.
- Would you like me to provide you with information regarding services and supports in your area?

### **Other Important Referral Considerations....**

*If inquirer answers yes to Q4 (Military), screener offers/assists accessing resources refer to appropriate services.*

- Have You Served: A National Resource for Veterans: [www.haveyoueverserved.com/veteran-resources.html](http://www.haveyoueverserved.com/veteran-resources.html)
- ServiceLink Veteran's Resources: [www.nh.gov/serviceLink/veteran-resources.htm](http://www.nh.gov/serviceLink/veteran-resources.htm)
- Easter Seals Military and Veterans Services program: [www.vetscount.org](http://www.vetscount.org)
- NH Care Path: [www.nhservicesandsupports.org/](http://www.nhservicesandsupports.org/)

#### ***Screener could say:***

- Based on your response, you may be eligible for resources based on your military service. Would you like assistance to learn more about this?

***If Q11 indicates no health insurance or Q9 Pressing Need indicates “financial assistance with my prescriptions,”*** refer inquirer to Health Exchange Navigator or provide information pertaining to the Health Insurance Exchange and/or NH Health Protection Program.

- Option 1: Depending on inquirer’s preferences, screener may offer referral to local Health Exchange Navigator. A listing of in-person assisters can be found here: [www.coveringnewhampshire.org/get-help](http://www.coveringnewhampshire.org/get-help)
- Option 2: Depending on inquirer’s preferences, screener may provide online information to NH’s Health Exchange website: [www.coveringnewhampshire.org](http://www.coveringnewhampshire.org) and DHHS’s website for the NH Health Protection Program: [www.dhhs.nh.gov/ombp/nhcpp/](http://www.dhhs.nh.gov/ombp/nhcpp/)

***Screener could say:***

- Based on your response, you may be eligible for a health insurance plan through the Health Insurance Exchange or through the NH Health Protection Program. Would you like assistance with your application?

## **HELPFUL RESOURCES/LINKS**

**Have You Served: A National Resource for Veterans** <http://www.haveyoueverserved.com/veteran-resources.html>

**NH Bureau of Elderly & Adult Services (BEAS)**  
[www.dhhs.nh.gov/dcbcs/beas/](http://www.dhhs.nh.gov/dcbcs/beas/)

**NH Bureau of Behavioral Health**  
[www.dhhs.state.nh.us/dcbcs/bbh/](http://www.dhhs.state.nh.us/dcbcs/bbh/)

**NH Bureau of Developmental Services**  
<http://www.dhhs.nh.gov/dcbcs/bds/>

**NH Care Path**  
[www.nhservicesandsupports.org](http://www.nhservicesandsupports.org)

**NH Division of Client Services**  
[www.dhhs.nh.gov/DFA](http://www.dhhs.nh.gov/DFA)

**NH Easy**  
[www.nheasy.nh.gov](http://www.nheasy.nh.gov)  
**NH DHHS Health Protection Plan**  
[www.dhhs.nh.gov/ombp/nhhpp](http://www.dhhs.nh.gov/ombp/nhhpp)

**NH Health Insurance Exchange**  
[www.coveringnewhampshire.org/](http://www.coveringnewhampshire.org/)

**NH Health Information Organization**  
[www.nhhio.org/](http://www.nhhio.org/)

**ServiceLink Aging and Disability Resource Network – Connections for Independent Living**  
[www.servicelink.org](http://www.servicelink.org)

**ServiceLink Veteran's Resources**  
[www.nh.gov/servicelink/veteran-resources.htm](http://www.nh.gov/servicelink/veteran-resources.htm)