



Tuesday Tip - Evaluation Task Scenario

If you contact a member to schedule a time to complete the initial/ongoing assessment and they are unavailable to complete the assessment until after the Evaluations Task due date, leave the Eval Task in **"Pending"** status. In these cases you will **NO LONGER** save the Eval Task in **"Refused"** status.

For example, a Care Manager has a pending Eval Task due Jan 19th for member Betty White. The Care Manager contacted Betty via phone on Jan 5th to schedule a home visit to complete the Comp 3.0. During the call, Betty informed the Care Manager that she was unavailable until Jan 25th. She also told the Care Manager that she would be available at 3:00pm that day. The Care Manager noted the date and time that Betty was available for the home visit in the **Evaluation Scheduled Date/Time field** on the Eval Task and then saved and closed the Eval Task leaving it in "Pending" status. On Jan 25th, during the home visit with Betty, the Care Manager will open the same Eval Task to launch and complete the Comp 3.0.

Evaluation Task for: Betty White Status Pending

Primary Phone: (916) 757-1444 **Responsible Phone:** **DOB:** 8/12/1935 Date Saved in Final Status

*** Note: An Evaluation is the Task for a Comprehensive Assessment ***

Assigned To: Damien Wimbush - Case Management (617) 972-9400 x58203 **Assigned Date:** 01/05/2016 **Created Date:** 10/6/2015 2:07:01 PM

[Click here to document call attempts](#)

Date	Activity	Outcome	Notes
1/5/2016 3:53:28 PM	Phone Call: Outbound - member/caregiver	Successful	Called member to schedule time to administer ongoing assessment. Member unavailable until 1/25/16 at 3:00pm. ~Name, Title

*** The following fields refer to the next Comprehensive Assessment ***

Evaluation Due: 1/19/2016 **Did member agree to assessment?** Yes No

Evaluation Type: Ongoing **Evaluation Method:** Visit **Evaluation Scheduled Date/Time:** 1/25/2016 3:00 PM

Notes: **Assessment Taken Date:**

Days Since Last Comprehensive 3.0: **Days Since Last Comprehensive 2.0:** 753 **Days Since Last MDS-HC:** 158 **Void Evaluation:**

Comprehensive 3.0

Previously, in examples like the one above, Care Managers were instructed to close the Eval Task out as "Refused", but this is no longer the procedure, effective immediately.

NOTE: Remember you do not want to select an answer to the question, "**Did member agree to assessment?**" on the Eval Task until you are ready to launch the Comp 3.0 assessment. Unfortunately, if you select "NO" for the question and save the Eval Task but need to change your selection to "YES" for some reason afterward, you won't be able to make the change.