

# Waiting List Assessment

Changes to OAC 5123-9-04

Ohio Department of Developmental Disabilities

Medicaid Development & Administration

Presented by: Amanda Rowlinson, MHSA

Karin Crabbe & Chad Phipps, Stakeholder Group

October 29 and 31 2024



**Department of  
Developmental  
Disabilities**

# Agenda

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# Purpose of Changes to OAC 5123-9-04

The purpose of changes to the home and community-based waiting list assessment rule is to provide clarification for county boards, people served, guardians, and their families around the process of administering the waiting list tool. It will identify a clear timeline for administration of the tool and updates to definitions used within the rule.

# Updates to Definitions

"Community-based alternative services" means alternative services that are available and likely to meet an individual's needs in a setting other than a hospital, an intermediate care facility for individuals with intellectual disabilities, or a nursing facility. "Community-based alternative services" includes, but is not limited to, services provided through a community mental health agency or a public children services agency or services arranged by a county family and children first council described in section 121.37 of the Revised Code.

# When to Administer the WLA

When an individual, their guardian, or member of their family:

- Requests the county board to administer the WLA.
- Requests the individual be enrolled in a HCBS waiver or placed on the waiting list.
- When they have identified an unmet need.

# When to Re-Administer the WLA

- A county board will re-administer the waiting list assessment tool to an individual when the individual, the individual's guardian, or a member of the individual's family identifies a change in circumstance that may result in the individual having a current need or an immediate need.

# Timeline for Completing the WLA

- The waiting list assessment will be **initiated** by doing the interview within **15 calendar days** of the date the request has been made by the individual, guardian, or member of the family.
- The county board will **complete** the WLA within **45 calendar days** of the interview.
- The county board will **notify** the individual, guardian, member of the family of the outcome within **10 calendar days** of the completion.

# Timeline for Completing the WLA

- What if there are delays in completing the WLA?
  - The SSA will document extenuating circumstances related to the individual if there is a delay in interviewing or completing the tool.
  - Delays are related to the individual and their circumstances, not the county board.

# Notification of the WLA Outcome

- The county board will notify the individual, guardian, and/or their family member in writing with the following information:
  - A copy of the completed WLA tool and explanation of due process.
  - The specific community based alternative services that address each assessed need.
  - The date the county board will follow up with the individual to determine if services have been accessed.
  - Contact information for the service and support administrator (SSA) who will assist in accessing community based alternative services.

# Due Process

- Due process is given when a county board takes actions of:
  - Placement on the waiting list
  - Denial of placement on the waiting list
  - Removal from the waiting list
- The county board will issue and explain due process to the individual, guardian, and family member.
- The SSA may assist the individual in formally appealing the decision if they request help.

# Providing Good Content

- Ensure you have informants that know the individual best.
- Ask for documentation ahead of the assessment meeting.
- Elaborate on sections that explain the individual's needs and circumstances.
- Be descriptive with alternative resources and the need they will meet.
- Cross reference alternative resources section to ensure it matches the needs that were identified in areas the individual reports needing help with at the beginning of the assessment.

# Double Check Your Work

- Things that should be in the assessment:
  - Areas in which the individual needs help.
  - Explanation/detail of help the individual needs within different areas of the tool (i.e., Physical care needs, behavioral needs, medical needs).
  - Specific alternative resources that are likely to meet the need and available to the individual.
- Things that should NOT be in the assessment:
  - Parents of Minors is not a service. This should not be identified as an unmet need. Determine whether the child would benefit from services such as HPC, HHC, nursing, etc.
  - Additional requirements the individual and their family must go through above and beyond what is set forth in rule.

# Myth Busters about WLA

- An individual does not have to apply for an Ohio Home Care waiver before completing the WLA.
- An individual does not have to apply for OhioRISE before completing the waiting list assessment.
- The individual does NOT have to be Medicaid eligible before going on the waiting list.
- Parents of Minors is not a service to meet a child's needs.
- The individual does not have to be county board eligible to complete a WLA.
- An individual does not have to find grants to apply for before determining an individual has an unmet need.
- Medicaid State Plan Services should not be used as an alternative resource unless it is available and can meet the need for the individual.

# Community-Based & Alternative Services

- Examples of services:
  - Funding from Family and Children First Counsel to pay for a respite camp in the summer.
  - Payment on a sliding scale for medically necessary services through BCMH.
  - Support from Job and Family Services for day care providers to appropriately meet the child's needs.
  - Using Medicaid State Plan for a speech device.
  - Accessing OhioRISE for behavioral health services for a child that meets eligibility for Multi System Youth.
  - Transportation through ODJFS or Managed Care for medical appointments.
  - Using Medicaid Card Services for incontinence supplies that have been identified as medically necessary through the individual's physician.
  - Using the local Lion's Club to build a ramp on the front of the individual's home.
  - Applying for a grant with the Autism Society to buy sensory items.
  - Local CB funds for a safety evaluation and the purchase of door chimes for elopement.

# WLA and BSH Appeals

- When completing the JFS Form for right to state hearing, ensure you are describing the action taken and the rule citation that coordinates with the determination.
- When an individual and their family have requested a state hearing it is important to provide supportive documentation, and rule cites for your determination in the appeal summary uploaded in SHARE portal.
- After a state hearing, it is important to complete all pieces of Compliance if issued to the county board. This includes uploading a copy of the determination letter and due process if a new assessment was requested in the hearing decision.

# QUESTIONS?

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Questions after this presentation, email [Amanda.Rowlinson@dodd.ohio.gov](mailto:Amanda.Rowlinson@dodd.ohio.gov)



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# Resources

- Assessment for Immediate and Current Need  
<https://dodd.ohio.gov/county-boards/assessments/assessment-immediate-current-need>
- Frequently Asked Questions
- <https://dodd.ohio.gov/county-boards/all-county-boards-resources/waiting-list-assessment-faq>