

## Lead Agency Housing with Services Procedures

### Overview

All prospective residents of Minnesota registered housing with services (HWS) settings must have the opportunity to receive long-term care options counseling before signing a lease or service contract. Whether they choose to receive counseling or decline it, all prospective residents must receive proof they were offered counseling, known as a verification code. HWS settings must obtain a copy of each resident's individual verification code before they sign a lease or service contract and retain a copy of it in their file. Exemptions and exceptions are outlined below.

The Senior LinkAge Line® provides phone-based long-term care options counseling, which prospective residents can get by calling toll-free at 800-333-2433. Lead agencies, which include counties, health plans and tribes, provide in-person long-term care consultations. They can generate verification codes via the state's MMIS system for those to whom they provide long-term care options counseling (face-to-face assessments).

The information that follows will provide lead agency staff with step-by-step instructions that reflect questions posed by lead agencies. For more information, see [DHS Bulletin #19-25-04](#).

### Procedure for prospective Minnesota HWS residents not previously assessed

The procedure that follows is for non-exempt prospective residents not previously assessed by a lead agency or have not received long-term care options counseling from Senior LinkAge Line.

1. Prospective resident is referred to the lead agency for a long-term care consultation (LTCC) assessment.
2. As the lead agency, you begin by setting up an appointment with the prospective resident for the LTCC assessment.
3. Next, you do the LTCC assessment – Activity Type 02 (face-to-face), 04 (relocation/transition assessment), 06 (reassessment) or 08 (CAC/CADI/BI reassessment for 65<sup>th</sup> birthday).
4. Once you have successfully submitted the approved screening document into MMIS, it will generate a verification code. Verbally tell the verification code to the prospective resident and if possible, mail it to them using the form sent in the lead agency memo.
5. The prospective resident can then share their code with their chosen HWS setting, which must be kept in the resident's file.

### Prospective residents who have a case manager or care coordinator

If a prospective resident is currently open to a waiver (EW, AC, CAC, CADI or BI) and was previously screened prior to September 1, 2012, call the Senior LinkAge Line at 800-333-2433 to obtain their code. For those screened after September 1, 2012, you can find their code in MMIS.

### People who have received a long-term care consultation assessment

- Those under the age of 65 admitted into a nursing facility for greater than 40 days who received a face-to-face assessment do not need to receive long-term care options counseling provided by the Senior LinkAge Line. Their verification code should be automatically generated when a screening document is successfully entered into MMIS.
- Those who have received a face-to-face assessment either through a county or other agency referral do not need counseling provided by the Senior LinkAge Line. Their verification code should be automatically generated when an assessment is successfully submitted into MMIS.

### Exemptions and Exceptions

People who meet the following exemptions and exceptions do not need a verification code:

- People with or entering into a lease-only arrangement with a subsidized housing setting
- People who already received in-person options counseling and received a verification code
- People receiving or being evaluated for hospice services from a licensed hospice provider
- People with a long-term care plan created 12 months prior to signing a lease - the plan must:
  - include an alternate decision maker, if the person cannot make their own financial or health care decisions
  - cover the financing of rent and service costs for 60 months after the person moves and does not include public program payments, such as Medical Assistance or group residential housing
- People who move into a housing setting on an emergency basis, including moves outside Senior LinkAge Line business hours

The exemption for lease-only arrangements will apply to:

- HWS settings that are federal or state assisted housing programs listed above required to register as a housing with services provider
- A HWS provider that is not required to register but chooses to so
- People who have tenant-based Section 8 vouchers, which is a federal program that provides an individual subsidy entering into lease only arrangements do not need to call for long-term care options counseling. However, unless the setting qualifies under one of the exemptions above, the setting itself is not exempt.

### Special Conditions

- Encourage those on a **waiting list** to call and get long-term care options counseling ahead of time. Providers can make a referral through the [online referral site](#).
- **Married couples** should both receive counseling, if both are considering a move.
- **People moving from out-of-state** to a Minnesota HWS setting must call and receive counseling before signing a lease or service contract.