

## V—Virtual Visits\*

This section pertains to the Office of Aging and Adult Services (OAAS) allowance per the Centers for Medicare & Medicaid Services (CMS) approval for required contacts with Community Choices Waiver (CCW) and Adult Day Health Care (ADHC) waiver participants to be conducted via a virtual platform. Virtual contacts/visits, in regards to this procedure, is defined as remote contact comprised of both video AND audio components with a participant via an approved, HIPAA compliant software platform. Virtual contacts may be conducted with waiver participants if certain criteria and conditions are met while in compliance with the Health Insurance Portability and Accountability Act (HIPAA) of 1996, as outlined in the following procedure.

For telehealth/virtual contact definition and policy, refer to the OAAS Telehealth/Virtual Contact Policy, OAAS-ADM-23-011.

### V-100 Virtual Contacts Procedure

#### **CCW Participants Without ADHC Service:**

SCs are required to complete at least 2 separate in-person visits with the CCW participant per Plan of Care (POC) year:

- An InterRAI HC (iHC) assessment and
- At least 1 of the 4 required quarterly visits.

**NOTE: ALL iHC assessments must be conducted in person. Refer to Section H-Assessments/Reassessments of this Manual.**

Virtual quarterly visits meeting contact requirements cannot be held consecutively.

The Plan of Care (POC) meeting may be conducted virtually; however, all POC documents and forms must be signed by the involved parties, including the participant and/or their representative, the Support Coordinator (SC) and waiver service providers. The actual POC signature and budget pages must be signed. Methods for obtaining acceptable signatures include: in person, by fax, scanned/emailed securely or electronically. Physical signatures, electronic signatures or verbal agreements are acceptable on the OAAS Back-Up Staffing

Plan, OAAS-PF-10-015 and the OAAS Emergency Plan, OAAS-PF-09-004. Refer to Electronic Signature Policy for Support Coordination Agencies, OAAS-ADM-25-001.

Additional contacts or visits outside of the waiver requirements can be conducted virtually following the same policy and procedure outlined in this document and in the OAAS Telehealth/Virtual Contact Policy, OAAS-ADM-23-011.

### **CCW Participant with ADHC Service:**

SCs are required to complete at least 3 separate in-person visits with the CCW participant per Plan of Care (POC) year:

- An interRAI HC (iHC) assessment,
- At least 1 of the 4 required quarterly visits at the participant's home, and
- At least 1 of the 4 required quarterly visits at the participant's ADHC center.

**NOTE: ALL iHC assessments must be conducted in person. Refer to Section H-Assessments/Reassessments of this Manual.**

Virtual quarterly visits meeting contact requirements cannot be held consecutively.

The Plan of Care (POC) meeting may be conducted virtually; however, all POC documents and forms must be signed by the involved parties, including the participant and/or their representative, the Support Coordinator (SC) and waiver service providers. The actual POC signature and budget pages must be signed. Methods for obtaining acceptable signatures include: in person, by fax scanned/emailed securely or electronically. Physical signatures, electronic signatures or verbal agreements are acceptable on the OAAS Back-Up Staffing Plan, OAAS-PF-10-015 and the OAAS Emergency Plan, OAAS-PF-09-004. Refer to Electronic Signature Policy for Support Coordination Agencies, OAAS-ADM-25-001.

Additional contacts or visits outside of the waiver requirements can be conducted virtually following the same policy and procedure outlined in this document and in the OAAS Telehealth/Virtual Contact Policy, OAAS-ADM-23-011.

### **ADHC Participants:**

SCs are required to complete at least 3 separate in-person visits with the ADHC participant per Plan of Care (POC) year:

- An interRAI HC (iHC) assessment,
- At least 1 of the 4 required quarterly visits at the participant's home, and
- At least 1 of the 4 required quarterly visits at the participant's ADHC center.

**NOTE: ALL iHC assessments must be conducted in person. Refer to Section H-Assessments/Reassessments of this Manual.**

Virtual quarterly visits meeting contact requirements cannot be held consecutively.

The Plan of Care (POC) meeting may be conducted virtually; however, all POC documents and forms must be signed by the involved parties, including the participant and/or their representative, the Support Coordinator (SC) and waiver service providers. The actual POC signature and budget pages must be signed. Methods for obtaining acceptable signatures include: in person, by fax, scanned/emailed securely or electronically. Physical signatures, electronic signatures or verbal agreements are acceptable on the OAAS Back-Up Staffing Plan, OAAS-PF-10-015 and the OAAS Emergency Plan, OAAS-PF-09-004. Refer to Electronic Signature Policy for Support Coordination Agencies, OAAS-ADM-25-001.

Additional contacts or visits outside of the waiver requirements can be conducted virtually following the same policy and procedure outlined in this document and in the OAAS Telehealth/Virtual Contact Policy, OAAS-ADM-23-011.

If the above criteria is met AND the participant or their representative chooses a virtual contact, prior to the virtual visit the SC must:

- Provide written instructions of virtual contacts to the participant and/or their representative, at least annually and as requested by the participant and/or their representative.
  - The instruction must include how to utilize the virtual software/platform technology, including the specific format and signing in and out.
- Review the written virtual contact instructions with the participant and/or their representative and ensure the instructions and guidelines are understood, at least annually, and as requested by the participant and/or their representative.

- Ensure the participant and/or their representative agree to the virtual contact for every virtual contact. Participants and/or their representative may refuse the virtual option at any time, which would require an in-person visit.

The SCA must have written instructions specific to the HIPAA compliant video conference software platform to review with the participant. The virtual visit checkbox on the Support Coordination Contact Document (SCD) must be checked and the SCD form signed by the SC verifying that:

- The instructions were reviewed with the participant/their representative,
- The participant/their representative understood the instructions and
- The participant/their representative consented to the virtual visit.

Once the SC has obtained the participant and/or their representative's consent for the virtual contact, during the virtual visit the SC will:

- Utilize an approved telehealth/virtual video communication software/platform as outlined in the OAAS Telehealth/Virtual Contact Policy, OAAS-ADM-23-011.
- Verify the participant's and/or their representative's identity.
- Inform the participant and their representative of all individuals present and their role.
- Obtain the participant or their representative's consent to record the visit, if applicable.
- Ensure the virtual visit does not take place within a bedroom or bathroom.

**NOTE: A virtual visit cannot take place for a bedbound participant unless the participant is located in a room other than a bedroom.**

If the participant requires hands-on or physical assistance to participate in the virtual contact and the assistance is not available, the SC must conduct an in-person visit.

During the virtual contact, the SC will observe and assess the participant's health, safety and general well-being. If there are any concerns, the SC will:

- Conduct an in-person visit with the participant.
- Follow emergency reporting protocol, refer to CIR policy and procedure: Critical Incident Reporting Manual, OAAS-MAN-19-002 and Critical Incident Report Timelines, OAAS-PC-21-003.

When completing the Support Coordination Contact Documentation (SCD), the SC will enter the code “08-Telehealth” for the Type of Contact.

\*For the purpose of this document, the term “virtual contact” will be used throughout this and is synonymous with the terms “telehealth contact”, telehealth visit” and “virtual visit”.