

**General Instructions**  
**Special Health Care Needs (SHCN) Assessment Tool- Child and Adult**

The goal of QUEST Integration (QI) is to provide improved access and enhanced quality healthcare services to eligible Medicaid members for medically necessary healthcare services. The health plans shall use the Health and Functional Assessments (HFA) to provide a thorough face-to-face assessment of QI members that have Special Health Care Needs in order to design a functional personalized service plan for QI members. The service coordinator shall base the service plan on the HFA. The service coordinator shall develop the service plan in conjunction with the member, authorized representative (if applicable), the Primary Care Provider (PCP) and other providers.

The SHCN HFA serves as a starting point in the development of the service plan requiring input from all primary participants of the member's healthcare team. The HFA requires a multidisciplinary approach to determine appropriate services. The service coordinator should have health care training and skills to best serve their member. This may be a licensed nurse, a social worker, or other healthcare professional. The service coordinator will use high-quality professional assessment skills in the process of identifying and providing necessary services for QI members. The service coordinator will need to collaborate with the PCP, service providers and the member (or authorized representative).

The service coordinator shall obtain information for the HFA from a variety of sources. Health plans are encouraged to prepopulate as much of the objective data from their records (i.e., claims, prior assessments, etc.) or other providers prior to the face-to-face assessment. Health plans may consider their information [or that provided by the Department of Human Services (DHS)] as a primary data source. The service coordinator shall validate prepopulated information with the member. In addition, whenever possible, the services coordinator shall obtain information directly from the member.

The service coordinator may verify information for the HFA with records, other members of the team, or the member. For example, medications the member is currently taking should be compared with the health plan's records to assure accurate medication management. The service coordinator shall document information obtained from a source other than the member or a primary source in the comment section of the tool.

Both the Child and Adult SHCN HFA have individualized instructions. Please read all instructions accompanying each assessment for specifics on each section. An appendix is found in the final section of each HFA's set of instructions. This appendix includes a list of acronyms to clarify the various acronyms used throughout the assessments.

**Initial Assessments** will be conducted by the assigned service coordinator. The health plan will use the entire tool for initial assessments. The service coordinator shall complete all pertinent sections; however, all sections will not be appropriate to review with each member, e.g., only pregnant females are assessed in the pregnant female section or the diabetes section does not need to be completed unless someone has diabetes. Service coordinators shall use professional

discretion in recognizing the sections appropriate for the member. Insight specifically identified through a member's history (i.e., diagnoses, medications, treatments, equipment, previous and current services provided) will serve as a guide. The primary service coordinator will initiate the service plan.

**6-month Reassessments** occur for all members with special health care needs. The reassessment allows the service coordinator to prioritize or reprioritize goals identified for the member and revise/update the service plan. These reassessments are completed with a different document than the initial/annual SHCN HFA tool. This periodic reassessment is an abbreviated version of the annual assessment, serves to identify changes in the member's health status, and monitor the efficacy of the service plan. The primary service coordinator will perform these reassessments. The reassessment tool does not have a separate set of instructions; the instructions have been included on the reassessment tool. The service coordinator shall refer to the SHCN HFA instructions for specific information or questions.

**Reassessment due to significant change in status** uses the same tool as the initial assessment. Members that have a significant change in status may have increased healthcare needs that cannot be obtained from the reassessment tool. The service coordinator will assess for changes that have occurred for the member and identify any need for new or additional services. The service coordinator does not need to complete all sections of the HFA, only those applicable to the member's health and functional status.

**Annual Assessments** will use the same tool as the initial assessment. The service coordinator will perform this assessment. The service coordinator will assess for changes that have occurred for the member, identify any need for new or additional services and update all applicable sections of the HFA.