



Department  
of Health

# Changes to the Pre-Admission Screening Process for Transitional Adult Homes

January 2022

# Goal of Today's Training

- Department of Health (Department) regulations at 18 NYCRR §487.4(e) establish a preadmissions process for Transitional Adult Homes (TAHs).
- The process requires screening of prospective residents to determine whether they may be a person with serious mental illness (SMI). Depending on the screening results, a mental health evaluation may be required.
- The Department has arranged for Kepro to conduct the screening and the evaluations.
- Kepro will explain the process for TAHs to request screening and evaluations, and how results will be communicated.

# Preadmission Screening (Current)

- Prior to any admission to a TAH, the operator must contact the Department to request a pre-admission screening by sending the prospective resident's name, date of birth, guardianship information, and Medicaid identification number.
- Currently, the screening request and the prospective resident's information is sent directly to the Department via the Community Transition Upload tool on the Health Commerce System.
- If the prospective resident is not enrolled in Medicaid, the TAH must indicate whether the pre-admission interview and/or medical evaluation suggest a need for a mental health evaluation (MHE).
- The Department provides a response within three business days of receiving a complete request.



# Preadmission Screening (Future)

- Going forward, TAHs will contact Kepro to request screening and submit the prospective resident's name, date of birth, guardianship information, and Medicaid identification number.
- The TAH will submit a *PSYCKES Consent Form*, which will be made available by the Department and must be signed by the prospective resident.
- If the prospective resident is not enrolled in Medicaid, the TAH will submit copies of the written summary of the admission interview and the medical evaluation, along with an *Authorization for Release of Health Information (DOH 5032)*.
- Kepro will provide a response within three business days of receiving a complete request.



# Goals of the Revised Process

- Streamlined pre-admission process.
- Consistency of evaluations to benefit the resident/prospective resident.
- Consistency of records to benefit the TAH.
  - Better QSIR data.
  - Easier to provide records at survey.

# Screening Results: Information Needed

- Lack of Medicaid Information
  - Currently, the Department contacts the TAH and ask if the pre-admission interview and/or medical evaluation suggest a need for an MHE.
  - Going forward, Kepro will handle this outreach, and the TAH should submit a completed *Authorization for Release of Health Information (DOH 5032)*.
  - Kepro will determine whether an MHE is warranted.

# Screening Results: No Indication of SMI

- If the screening does not indicate that the prospective resident may be a person with SMI, the Department communicates that the TAH may admit the resident if all other admission criteria are met.
  - Going forward, Kepro will handle this communication.

# Screening Results: SMI Indication

- If the pre-admission screening indicates the prospective resident may be a person with SMI, the individual cannot be admitted unless:
  - An MHE concludes that the individual is not a person with SMI; or
  - An MHE concludes the prospective resident is a person with SMI, but the individual is a former TAH resident and the operator obtains a waiver from the Department permitting the individual's admission.
- Currently, TAHs arrange for MHEs to be conducted using the *Adult Care Facility Mental Health Evaluation Form (DOH-5075)*.
  - Going forward, to pursue admission when a MHE is required, TAHs must contact Kepro.



# Requesting a Mental Health Evaluation

- When requesting that Kepro conduct an MHE, the TAH will submit:
  - The summary of the resident interview;
  - The medical evaluation; and
  - A completed *Authorization for Release of Health Information (DOH 5032)*.
- TAHs may provide additional information they believe will help Kepro in conducting the MHE (for example, information from a treating provider).

# Results of the Mental Health Evaluation

- Kepro will report to the TAH that the result of the MHE is:
  - The individual is not a person with SMI, in which case the individual can be admitted without an approved waiver; or
  - The individual is a person with SMI and cannot be admitted absent an approved waiver.
- Kepro will provide a copy of the completed MHE to the TAH.
- A TAH would use the completed evaluation if it wanted to apply for a waiver for a former TAH resident.
- A TAH may also use the evaluation to help identify and meet the needs of those individuals who are appropriately admitted.

# Consent Forms

- The Department will share copies of the two consent forms, pre-filled as much as possible: the *PSYCKES Consent Form* and the *Authorization for Release of Health Information (DOH 5032)*.
- When requesting screening, the TAH must provide a completed copy of the *PSYCKES Consent Form*.
- The *Authorization for Release of Health Information (DOH 5032)* will be submitted at the time of a screening request, if the prospective resident is not enrolled in Medicaid or lacks sufficient Medicaid history, or at the point of requesting the MHE.
- TAHs must provide a copy of the signed consents to the prospective residents.

# Waiver Reminder

- The request must be complete, signed, and on the correct form.
- The request must be for a former resident of a TAH requesting admission to a TAH, with all pre-admission requirements met.
- The request must be approved pre-admission, or the TAH may face enforcement.



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# NEW YORK ADULT HOME PREADMISSION SCREENING AND MENTAL HEALTH EVALUATION

Provider Portal Training & User Guide  
Transitional Adult Homes



# Agenda

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1. Introduction
2. Provider Portal Overview
3. Registration for New Facilities
4. Logging In and System Navigation
5. Preadmission Screenings
6. Mental Health Evaluations
7. Viewing/Printing Outcomes
8. Questions and Answers



# Introduction

General Dynamics Information Technology's ("GDIT") wholly-owned subsidiary CSRA State and Local Solutions LLC, is New York State Department of Health's (NYSDOH) fiscal agent for the NYS electronic Medicaid program "eMedNY".

Through eMedNY, NYSDOH has contracted with GDIT to provide New York Adult Home Preadmissions screenings and Mental Health Evaluations.

GDIT has selected its long-term partner: Keystone Peer Review Organization, Inc. (Kepro), as its subcontractor for this initiative. Kepro has been expertly serving as GDIT's subcontractor for the eMedNY Pharmacy Prior Authorization Service (PPAS) since 2011.

Kepro was founded in 1985 by the Pennsylvania Medical Society. They are designated as a Quality Improvement Organization (QIO) and are URAC-accredited for Health Utilization Management, Case Management, Disease Management, and as an Independent Review Organization. Kepro has vast experience in serious mental illness (SMI) assessments, including in-person to ensure individuals receive appropriate services in the most integrated setting.

The GDIT/Kepro partnership brings extensive expertise and experience to the New York Adult Home Preadmission Screening and Mental Health Evaluation program.

## Contact Information

Toll-free: 888-612-1851

[TAH\\_Assessments@kepro.com](mailto:TAH_Assessments@kepro.com)

Fax: 718-816-3560

Ellen Olsen, LCSW, MBA  
Senior Executive Director  
888-612-1851 ext. 4064  
[eolsen@kepro.com](mailto:eolsen@kepro.com)

<https://NYassessments.kepro.com>

## What is Changing as of February 1<sup>st</sup>?

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Requirements for Preadmission Screenings and Mental Health Evaluations have not changed. Transitional Adult Homes will continue to follow all state regulations regarding the admission process.

### **NYS-DOH will continue with:**

- All oversight of the preadmission screening and mental health evaluation process

### **On behalf of the NYS-DOH, Kepro will be completing:**

- Preadmission Screenings
- Mental Health Evaluations

### **Transitional Adult Homes:**

- Will now submit Preadmission Screening requests directly to Kepro
- Will no longer complete their own Mental Health Evaluations on prospective residents and will now submit MH Evaluation requests directly to Kepro



# Admission Requirements

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Transitional Adult Homes must comply with Title 18 NYCRR 487 Standards for Adult Homes.

TAH staff will contact Kepro to obtain a pre-admission screening to determine whether the prospective resident may be a person with serious mental illness, as defined in Title 18 NYCRR 487.2.

If the prospective resident is found to possibly have SMI, the TAH will contact Kepro to complete a face-to-face mental health evaluation if admission remains the goal.

## Admission Requirements

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Kepto is providing a system to facilitate an efficient assessment process. The provider portal is easy to use and has multiple advantages, but it is not required.

- Prefer to **fax** in your requests and documentation? Fax to us at:
  - **718-816-3560**
- Prefer to send an **encrypted email** with your request and documentation?
  - You must use your company procedures to encrypt your email and send to us at:
  - **TAH\_Assessments@kepto.com**



## Kepro's NY State Assessment Provider Portal

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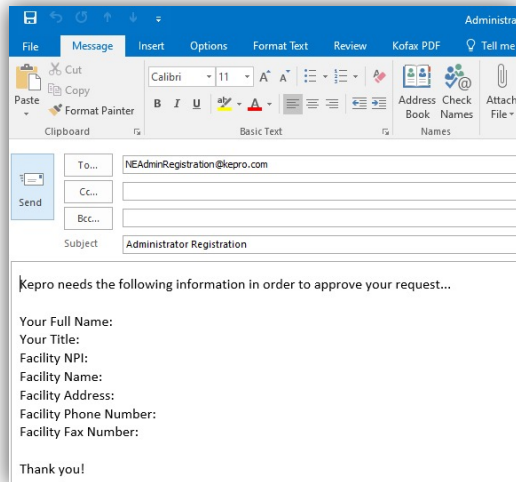
The new system is easy to use and has advantages!

- Real-time status tracking
- Faster results
- Communicate with Kepro via messages and notes
- Receive an email notification the instant the assessment has been completed
- Upload documents directly to the assessment case
- Full access to consumer records (easier searches and case creation)

To initiate the registration process, email Kepro at:  
[TAH\\_Assessments@Kepro.com](mailto:TAH_Assessments@Kepro.com)

### Helpful Hints

- You will need the NPI for your facility.
- The Administrator should be someone on your team who will be able to add and manage users in the system.



### Ready to Register?

- Facilities only need to be registered one time. The person chosen to register the facility will be the account administrator. This will be the first person to log into the provider portal under the TAH facility account.
- You will need to designate a Provider Administrator for your facility. This person will need to add and manage all other users of the Provider Portal.
- The Provider Administrator should email us at [TAH\\_Assessments@kepro.com](mailto:TAH_Assessments@kepro.com)
- Email us all of the following information:
  - Your Full Name:
  - Your Title:
  - Your Email Address:
  - Facility NPI:
  - Facility Name:
  - Facility Address:
  - Facility Phone Number:
  - Facility Fax Number:
- You will receive a response email from Kepro within 24 business hours with your registration code.

## NY Assessment Training

# Facility Registration – Create First Facility Account

### Helpful Hints

- Bookmark the Provider Portal URL for future use.
- Be sure to use the same NPI that you used when requesting the Registration Code.

### Received your registration code from Kepro?

- The Provider Portal is accessible at <https://portal.kepro.com>.
- Click on the **register here** link under the LOGIN section.
- Enter your facility NPI and the registration code that you received via email from Kepro.

**Kepro**

**LOGIN OPTIONS**

**Kepro Employees**  
Use this login button if you have a Kepro domain account.

**LOGIN**  
 Remember Me

**Customer/Provider**  
Use this login button if you are a customer or provider user.

**LOGIN WITH PHONE**  
**LOGIN WITH EMAIL**  
 Remember Me

If you don't already have a Kepro account, you can [register here](#).

If this is your first login with multi-factor authentication, [click here](#) to complete your registration.

Having trouble logging in? [Click here](#).

**Kepro**

Create a New Account - Specify Your Organization

NPI \*

PROVIDER REGISTRATION CODE \*

**< LOGIN** **NEXT >**

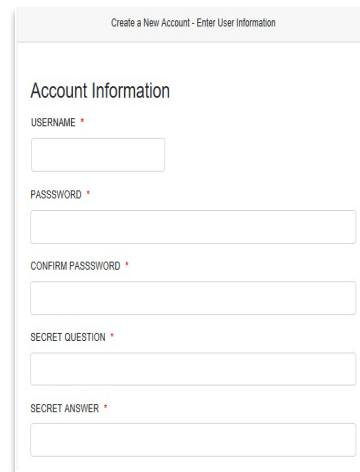
## Helpful Hints

- Fields that have an asterisk (\*) by them are required fields.
- Once complete, you will receive an email to verify your identity and begin multifactor authentication, MFA.
- The link in the email expires in 20 minutes.

## Facility Registration – Create First Facility Account

### What to Know

- Complete your **Account Information** by completing all required fields.
- Complete the **Contact Information** section making sure to use your **work email**.
- Add fax number then click **NEXT**.
- You will receive an Email from Atrezzo with a link to register your new facility. Click on the link.



NEXT >

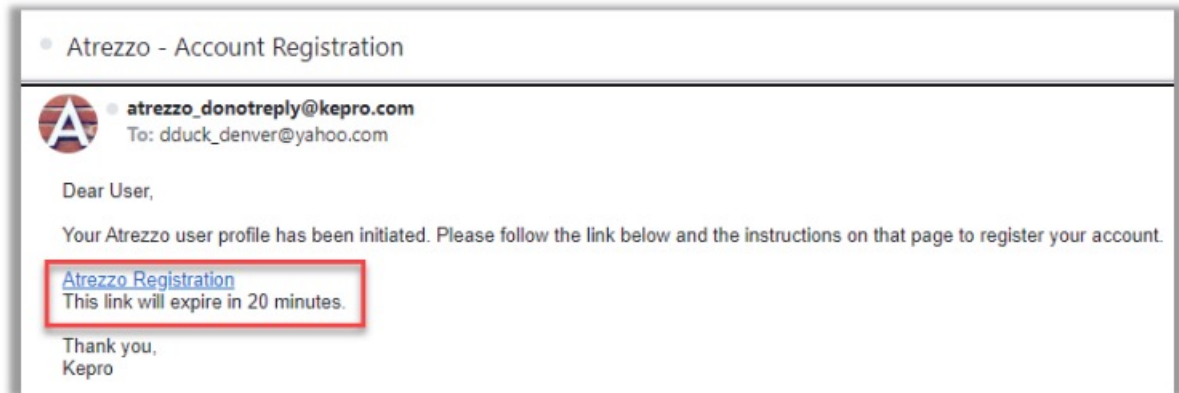
## NY Assessment Training

### Helpful Hints

- When choosing an authentication method, you will be required to enter an email address for both options.
- Most providers only choose the Email option if you do not have access to a direct phone line (landline or mobile)
- Click on the link within 20 minutes.

## Facility Registration – Create First Facility Account

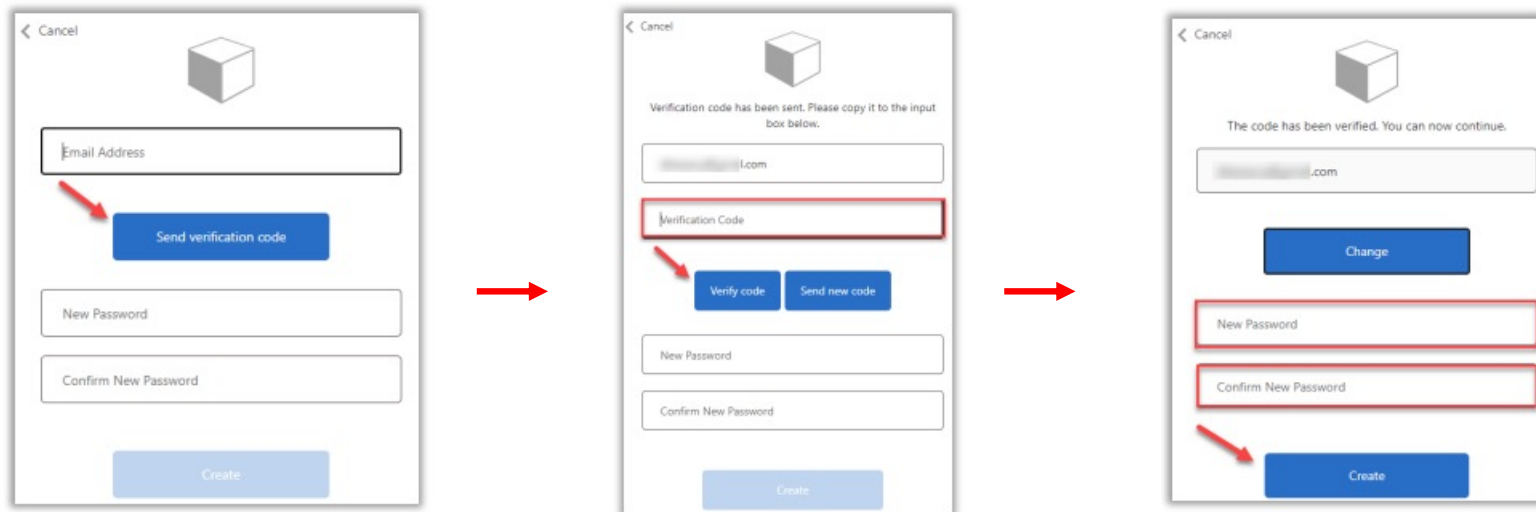
To complete the Multi-Factor Authentication registration, you must click the link in your email **within 20 minutes**.



## MFA Registration

### What to Know?

- After clicking on the link, choose email or phone to register with MFA.
- Email option example is below. Enter your work email address and click on send verification code.
- The code will be emailed to your work email address within seconds. Add this code to verify your identity.
- Create your new password, enter it twice, then click on create. You will be logged in and ready to go.





## New User Terms of Agreement

As a new user, you will need to read and agree to the Terms of Use.

Terms of Use Agreement

THE KEPRO PORTAL IS SUBJECT TO AND GOVERNED BY TERMS AND CONDITIONS OF USE. BY PROCEEDING OR USING THE KEPRO PORTAL YOU ARE AGREEING THAT YOU HAVE READ AND UNDERSTOOD THE TERMS AND CONDITIONS OF USE AND AGREE TO BE BOUND BY THEM. IF YOU DO NOT UNDERSTAND THE TERMS OR CONDITIONS OF USE OR DO NOT AGREE TO BE BOUND BY THEM, DO NOT PROCEED OR OTHERWISE USE THE KEPRO PORTAL. UNAUTHORIZED ACCESS TO THE KEPRO PORTAL IS PROHIBITED.

KEPRO PORTAL TERMS OF USE

1. This Terms of Use Agreement (the "Agreement") is between Kepro, Inc. ("We", "Us" or "Our"), the group/practice entity that has been provided an ID (as defined in Section 3 below) using this Portal (as defined below) (the "Provider") and the Users (as defined in Section 2 below) (the Provider and Users shall collectively be "You" or "Your"). This Agreement governs the use of the Kepro Portal, including without limitation, all software, insurance codes, graphics, logos, text, documentation, user guides, databases and compilations of all materials other than Patient Information (as defined in Section 6), enhancements, bug fixes, upgrades, modifications, and copies thereof, and all information, methods and processes contained therein (the "Portal"). By using the Portal, You agree that You accept the terms and conditions of use of the Portal and that You are an authorized user of the Portal. This Agreement is posted on the Portal and is subject to change at any time.

2. Authorized Personnel. This Portal is intended for access solely by physicians and authorized members of their staff. Authorized members include only (a) the personnel permitted to access and use the Portal by Provider ("Standard User(s)") and (b) Standard Users who have been assigned certain administrative duties ("Administrative User(s)"). ("Standard Users" and "Administrative Users" shall be collectively "Users"). If You are an Administrative User, it is Your responsibility to identify Standard Users, and to authorize, monitor, and control access to and use of the Portal by such Standard Users. All Users using the Portal represent and warrant that s/he is authorized to use the Portal and to bind You to the terms of this Agreement.

Kepro, Inc. 777 East Park Drive Harrisburg, PA 17111 Toll-free: 800.222.0771 Phone: 717.564.8288 Fax: 717.564.3862 www.kepro.com

I have read and agree to these terms of use.

[CONTINUE >](#)

You are registered! The system will automatically authenticate and display the home page.

## Create New/Additional Users

### What to Know

- Click on **Setup** on the top navigation pane. You will land in Manage Provider Groups. Always stay in this tab/section.
- Click on the **arrow** on the far right to expand the section, or “open” the row.

### Helpful Hints

- Always use Manage Providers Groups Tab
- New users will receive an email from our system that expires after 20 minutes. If this happens, they can call us to assist.

The screenshot displays the Kepro web application interface. At the top, a dark navigation bar contains the Kepro logo and several menu items: Home, Cases, Create Case, Consumers, Setup (highlighted with a red box), Message Center 1, Reports, and Preferences. A search bar with the placeholder 'Search by #' and a magnifying glass icon is located on the right side of the navigation bar. Below the navigation bar, a dark bar indicates the current context: 'Change Context Adult Home Tester, NY PAAH'. The main content area is titled 'SETUP / MANAGE PROVIDER GROUPS'. Underneath, the word 'SETUP' is displayed on the left, and a dark blue button labeled 'REGISTER NEW PROVIDER +' is on the right. Below this, there are two tabs: 'Manage Provider Groups (1)' (highlighted with a red box) and 'Manage Users (2)'. The 'Manage Provider Groups (1)' tab is active, showing a row with a house icon, the text 'Adult Home Tester', and 'NPI : 5555555555 / Adult Home / 123 Street'. A red box highlights a small downward-pointing arrow icon on the far right of this row.

## Create New/Additional Users

### What to Know

- After opening the row with your facility name and address, click on **Add New User**.
- Create a **username** and complete all required information in the section, click **Create**.

The screenshot shows a web interface for creating a new user. At the top, there is a dropdown menu labeled 'AVAILABLE USERS FROM YOUR GROUP' with 'Select Any' selected. To its right is an 'ADD' button. Further right is a blue button labeled 'ADD NEW USER' with a downward arrow, which is highlighted with a red box. Below this is the 'ACCOUNT INFORMATION' section, which includes a 'USER NAME' field with the text 'createusername' and a green checkmark indicating 'This Username is available!'. The 'CONTACT INFORMATION' section follows, with fields for 'FIRST NAME', 'LAST NAME', 'EMAIL', 'CONFIRM EMAIL', 'ADDRESS LINE 1', 'ADDRESS LINE 2', 'CITY', 'STATE/PROVINCE' (a dropdown menu with 'Select One'), 'POSTAL CODE', 'PHONE', and 'FAX'. At the bottom of the form is a note: 'Note: Providers in receipt of Faxed Determination Letters: Official Communication of service authorization will be sent to the fax number entered above.' To the right of this note is a blue button labeled 'CREATE' with a right-pointing arrow, also highlighted with a red box.

### Helpful Hints

New users will receive an email from our system that expires after 20 minutes. If this happens, they can call us to assist.

## Manage New Users

### Helpful Hints

- Always use **Manage Providers Groups** Tab to change roles or deactivate staff
- Any role with **“Admin”** allows the user to also create new users

### Need to Deactivate, Update, or Change a Role for a User?

- On the **Manage Provider Groups** tab, you may select a user and edit a user’s information or delete the user.
- To change user permissions, click on the **Select Role** dropdown and change to the desired access role, for example to create another admin over the facility account.
- You can create as many other users and admins as needed to help you to manage your facility account.

The screenshot shows the 'Manage Users' interface. At the top, there are two tabs: 'Manage Provider Groups (1)' (highlighted with a red box) and 'Manage Users (3)'. Below the tabs is a user card for 'Adult Home Tester' with NPI: 5555555555 / Adult Home / 123 Street. A red box highlights an upward arrow icon on the right side of the card. Below the card is a table with columns: NPI, PROVIDER TYPE, ADDRESS, and a delete button. The table contains one row: 5555555555, Adult Home, 123 Street. Below the table is a section 'AVAILABLE USERS FROM YOUR GROUP' with a dropdown menu set to 'Select Any', an 'ADD' button, and an 'ADD NEW USER' button. Below that is a section 'ASSOCIATED USERS' with a 'SELECT ROLE' dropdown menu. The dropdown is open, showing 'hellothere, hellothere' (highlighted with a red box) and 'Provider Staff Account' (highlighted with a red box). A red box also highlights a delete button next to the dropdown.

# NY Assessment Training

## Two Types of User Roles

There are two types of user roles:

1. **Provider Staff Account** - this role can request assessments and view/print documents
2. **Admin Account** - this role can request assessments, view/print documents, and create new users, change user roles, or deactivate users.

### Recap!

- Always use **Manage Providers Groups** Tab to change roles or deactivate staff
- Any role with **“Admin”** allows the user to also create new users

The screenshot shows the Kepro web application interface. The top navigation bar includes links for Home, Cases, Create Case, Consumers, Setup, Message Center, Reports, and Preferences. The current page is titled 'Adult Home Tester, NY PAAH' under the 'SETUP' section. The main content area is divided into 'Manage Provider Groups (1)' and 'Manage Users (3)'. The 'Adult Home Tester' group is selected, showing its NPI (555555555) and address (123 Street). Below this, there is a table of 'AVAILABLE USERS FROM YOUR GROUP' with a 'Select Any' dropdown and an 'ADD' button. The 'ASSOCIATED USERS' section shows two users: 'hellothere, hellothere' and 'Olsen, Ellen'. A dropdown menu is open for the 'hellothere, hellothere' user, showing a list of roles: 'Provider Group Admin', 'Provider Admin', 'Provider Staff Account', 'Provider Group Admin + Reports', and 'Provider Admin + Reports'. The 'Provider Group Admin' role is highlighted in the dropdown menu.

## Homepage Overview

### What to Know?

- When you log in, you will see the Home Page. There are several ways to search for consumers and cases in the Provider Portal. You will use **CREATE CASE** when creating a new request for a prescreening or mental health evaluation.
- You can also review the status of submitted cases, which can be done from the home page by choosing **CASES** or **CONSUMERS**.

Change Context Adult Home Tester, NY PAAH

HOME	0 NEW MESSAGES Go to Message Center	WORK-IN-PROGRESS 0	NOT SUBMITTED 1	SUBMITTED 20
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Request Saved But Not Submitted

## Search all Cases in your Facility Account

### What to Know?

- Click on Cases and fill in all required filters. For **case status**, you will only use **Submitted** (we are working on the assessment) or **Completed** (it is finished and ready to print) for Case Status.
- Click on the **Case ID** in blue to enter and view all details within the case.

Change Context Adult Home Tester, NY PAAH

CASE / SEARCH - BY CASE

CASES

BY CASE BY CONSUMER

CASE TYPE \*  
Assessment

CASE STATUS \*  
Submitted

REASON  
Select One

ASSESSMENT TYPE  
Select One

REQUEST TYPE  
Select One

SUBMITTED FROM DATE  
01/01/2022

SUBMITTED TO DATE  
01/30/2022

SEARCH

CASE ID	SUBMITTED ON	CASE STATUS	REASON	ASSESSMENT TYPE	REQUEST TYPE	PROVIDERS
220170009	1/17/2022 3:35:25 PM	Submitted	Pended Clinical Documents	NY PAAH	Mental Health Evaluation	Adult Home Tester

## Search Consumer – Cases by Consumer

### What to Know?

- Click on Consumers. Enter last name and DOB. Click on Search.
- Click on the correct Consumer's name in blue to enter the Consumer record.
- In the "Cases" section, view all cases by case status and case type. Click on the blue case ID to enter the case and view all case details.
- Shortcut – You can even create a new case on this person by clicking Create Case.

Kepro Home Cases Create Case Consumers Setup Message Center Reports Preferences Search by #

Change Context Adult Home Tester, NY PAAH

CONSUMERS / McLean Olsen

CONSUMER NAME	DATE OF BIRTH	MEMBER ID
McLean Olsen	12/01/2021	TEMP002142022012400000

CREATE CASE >

ASSESSMENT CASE(2)

Cases (2)

Case ID	Diagnosis	Case Status	Reason	Outcome	Assessment Type	Request Type	Letters	Messages	Attending Physician
<a href="#">220240045</a>		Submitted			NY PAAH	Mental Health Evaluation	0	0	
<a href="#">220240046</a>		Submitted			NY PAAH	Preadmission	0	0	

Displaying records 1 to 2 of 2 records

Previous 1 Next Show 10 Entries



### What to Know?

- When you expand the row, you will see all cases for that individual.
- You can sort by any of the column headers.
- Click on the Case ID number for any submitted or completed cases to view the outcome or print letters.

#### Cases (2)

Case ID	Diagnosis	Case Status	Reason	Outcome	Assessment Type	Request Type	Letters	Messages	Attending Physician
220240045		Submitted			NY PAAH	Mental Health Evaluation	0	0	
220240046		Submitted			NY PAAH	Preadmission	0	0	

Displaying records 1 to 2 of 2 records

Previous **1** Next Show 10 Entries

## What to Know?

- To request a preadmission screening or MH evaluation click **CREATE CASE** from the top navigation pane. Case Type is always Assessment and Case Parameters are always NY PAAH.
- Search for the consumer using last name and date of birth.
- If the correct consumer match is found, you can click on the button left of **SELECT MEMBER** and click **NEXT** to proceed with the case.
- If a consumer match is not found, you will be able to add the consumer to the system by clicking on **+ ADD TEMPORARY CONSUMER**

## Helpful Hints

- Enter the full last name when you search.
- If you do not find the person in your facility account, you will add them to the system.

The screenshot shows the 'NEW CASE REQUEST' form in the Kepro system. The form is divided into several sections:

- Case Type:** A dropdown menu set to 'Assessment'.
- Case Parameters:** Two dropdown menus, both set to 'NY PAAH'.
- Consumer Information:** A section containing a 'SEARCH CONSUMER' form with the following fields:
  - CONSUMER ID
  - LAST NAME \*
  - FIRST NAME (MIN 1ST LETTER)
  - DATE OF BIRTH \* (format: MM/DD/YYYY)A 'SEARCH' button is highlighted with a red box.

\*Combination of DOB and Last Name or Member ID

## Create Case – Add New Consumer

+ ADD TEMPORARY CONSUMER

SELECT MEMBER	NAME	DATE OF BIRTH	CONSUMER ID	CONTRACT	CASE COUNT
No records found.					
Unable to find the consumer you are looking for? Please refine search to continue.					

### What to Know?

- After you click on **+ADD TEMPORARY CONSUMER**, add all required fields.
- Contract and Plan dropdowns will always be **NY PAAH**
- **Complete** consumer information for all required fields\*
- Click on **Next** to create the consumer record.
- Click on **Create Case**.

## NY Assessment Training

### Helpful Hints

- It is best to add a person's **current location** in the address section unless unknown.
- Selecting “**Use Facility Address**” will populate the address information to match your facility and should only be used if the current location or mailing address is unknown.
- All fields with a red asterisk are required.

## Add New Consumer

### What to Know?

- The contact address that you enter should be the person's **mailing address** or their **current location**.
- Please always add their **Medicaid ID Number**.
- When finished, click on **Next** to load the consumer information and then click on **Create Case**

### CONTACT INFORMATION

USE FACILITY ADDRESS

ADDRESS LINE 1 *	ADDRESS LINE 2	CITY *	COUNTRY *
<input type="text"/>	<input type="text"/>	<input type="text"/>	Select One ▾
STATE/PROVINCE *	COUNTY *	POSTAL CODE *	PHONE NUMBER
Select One ▾	Select One ▾	<input type="text"/>	<input type="text"/>

### OTHER INFORMATION

SSN (XXX-XX-XXXX)	SELF PAY	PRIVATE INSURANCE	MEDICAID ID/SUBSCRIBER ID	MEDICARE HICN
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
MEDICARE MBI	OTHER ID			
<input type="text"/>	<input type="text"/>			

## Create Case – Enter Case Details

### What to Know? Only two rows are always required. Request Detail and Documents.

- Once you have created a case, you must complete the **Request Detail and Documents** sections in order to submit the request to Kepro.
- To open any section, click the **down arrow** all the way to the right side of the section row.
- Once the Request Detail row is open, choose NY PAAH in the **Assessment Type** dropdown.
- Choose Preadmission or Mental Health Evaluation **Request Type** dropdown
- You must upload **Consent for Preadmission** requests and a **Release of Information** for Mental Health Evaluations.
- Once required documents are uploaded, click on **Submit**.

● Contacts / Legal Representative	▼
✓ Submitting Provider Adult Home Tester / 5555555555 / Bronx / NY	▼
● Facility	▼
● Attending Physician	▼
● Request Detail	▼
● Diagnosis	▼
● Documents(0)	▼
● Questionnaires(0 of 0)	▼
● Notes	▼

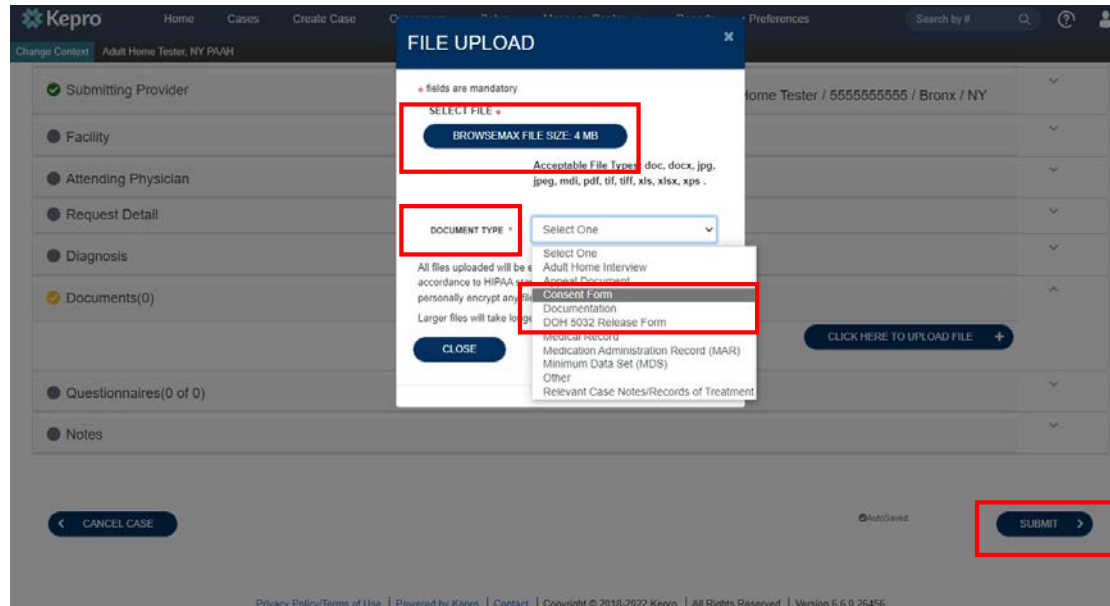
[← CANCEL CASE](#)

AutoSaved

[SUBMIT →](#)

## What to Know?

- Open the Documents Row. Choose Preadmission or Mental Health Evaluation **Request Type** dropdown
- Click on [CLICK HERE TO UPLOAD FILE +](#)
- **Preadmission** Cases: You must choose “**Consent Form**” in the Document Type drop down so the system recognizes your form.
- **MH Evaluation** Cases: You must choose “**DOH 5032 Release Form**” in the Document Type drop down so the system recognizes your form.
- Browse and choose file. Click on **Upload**.
- Once required documents are uploaded, click on **Submit**.



## Case Status – In Review

Once the case request has been submitted to Kepro, the status will appear as **IN-REVIEW**

- The case will not show a REASON or OUTCOME until it is either pended for additional information or completed.
- The case will move into completed status once we have made a determination. Letters/Forms can then be printed.

**Kepro** Search for Case #, Program # or Authorization # SEARCH Ellen Olsen

WORK QUEUE CASES CREATE CASE CONSUMERS PROVIDERS REPORTS

**ATREZZO - CASE DASHBOARD**

CONSUMER NAME	GENDER	DATE OF BIRTH	LOCATION	COUNTY	CONSUMER ID	CASE TYPE	CONSUMER CONTRACT
Ellen Olsen	Female	12/01/2021 (1 Months)	132 Street New York City NY	Bronx	TEMP002142021122700000	NY PAAH	NY PAAH

IN-REVIEW	CASE ID	CASE CONTRACT	SUBMITTED ON	COMPLETED ON	REASON	OUTCOME	OPEN TASKS	WORKING TASKS	COMPLETE MY WORKING TASKS
	220170009	NY PAAH	1/17/2022 3:35:25 PM				1	0	

Case Overview Review Call entries(0) Letters/Reports(0) Notes(0) Messages(0) Task Center(1) Alerts(0) Appointments (0) Case History

EXPAND ALL

- Contacts / Legal Representative
- Submitting Provider Adult Home Tester / 5555555555 / Bronx / NY

## Case is Pended for Additional Documentation

### Helpful Hints

- New documents can be uploaded directly to case at any time.
- If a case is pended, we will reach out to you for additional information or documentation.

- When a case is pended it means we need additional information or documentation, such as the TAH Interview and Medical Evaluation.
- We will reach out to you for this information via the system (notes/messages/letters) and by email and phone until received.

The screenshot shows the Kepro system interface. At the top, there is a search bar and navigation tabs for WORK QUEUE, CASES, CREATE CASE, and CONSUMERS. Below this is the 'ATREZZO - CASE DASHBOARD' for a consumer named Ellen Olsen. The dashboard displays personal information: Gender (Female), Date of Birth (12/01/2021 (1 Months)), Location (132 Street New York City NY), and County (Bronx). Below this is a table with columns: CASE ID, CASE CONTRACT, SUBMITTED ON, COMPLETED ON, REASON, and OUTCOME. The first row in the table shows a case ID of 220170009, contract NY PAAH, submitted on 1/17/2022 at 3:35:25 PM, and is marked as 'IN-REVIEW'. The reason for being pended is 'Pended Clinical Documents' and the outcome is 'Additional Information Needed'.

CASE ID	CASE CONTRACT	SUBMITTED ON	COMPLETED ON	REASON	OUTCOME
220170009	NY PAAH	1/17/2022 3:35:25 PM		Pended Clinical Documents	Additional Information Needed



## View Outcomes and Print Letters

### What to Know?

- The **REASON** tells you how the Case was completed (has or does not have SMI).
- The **OUTCOME** lets you know if the individual can admit to the TAH (may or may not admit).
- The notification/form will provide all details and will be faxed directly to the TAH and can be found under the Letters/Reports tab.

HOME
CASES
CREATE CASE
CONSUMERS
SETUP
MESSAGE CENTER
REPORTS
PREFERENCES
Help

ATREZZO - CASE DASHBOARD

CONSUMER NAME	GENDER	DATE OF BIRTH	LOCATION	COUNTY	CONSUMER ID	CASE TYPE	CONSUMER CONTRACT
Ellen Olsen	Female	12/01/2021 (1 Months)	132 Street New York City NY	Bronx	TEMP002142021122700000	NY PAAH	NY PAAH

	CASE ID	CASE CONTRACT	SUBMITTED ON	COMPLETED ON	REASON	OUTCOME
Completed	220170008	NY PAAH	1/17/2022 11:22:17 AM	1/17/2022 11:37:28 AM	Confirmed SMI	Not Suitable for Admission

Case Overview
Letters/Reports(0)
Notes(0)
Messages(0)

EXPAND ALL

## NY Assessment Training

### Helpful Hints

- Please make sure we have your most up to date contact information.
- We need a facility email address and/or fax number for notifications.

## Review Outcomes and View/Print Letters

- After clicking on the Letters/Reports tab, you will see blue links to the letters in PDF format.
- Kepro will fax a copy of the determination letter once completed to the contact information that we have on file.

Completed	CASE ID	CASE CONTRACT	SUBMITTED ON	COMPLETED ON	REASON	OUTCOME
	220300001	NY PAAH	1/30/2022 11:59:56 AM	1/30/2022 12:12:04 PM	MH Needs Can Be Met in ACF	Suitable for Admission

Case Overview	Letters/Reports(1)	Notes(2)	Messages(1)
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File Name	File Size
<a href="#">NYPAAH-MHEvaluation-220300001.pdf</a>	

### Preadmission Screening

- Kepro will access the New York State Office of Mental Health Psychiatric Services and Clinical Enhancement System (PSYCKES) to review all information on the individual's Medicaid behavioral health services. This requires that we have a copy of the consent form on file.
- Make sure to send the **consent** form or we cannot start the case.
- Documents can be uploaded, emailed to us at [TAH\\_Assessments@kepro.com](mailto:TAH_Assessments@kepro.com), or faxed to us at 718-816-3560.
- Preadmission screenings will be completed within **3 business days** of the request.

# Prescreen Outcomes

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Detailed information regarding the determination will be found in the notification letter.

## **Possible Outcomes:**

- Meets SMI Criteria - **Cannot Admit without Evaluation**
- Does Not Meet SMI Criteria - **Can Admit**
- Unable to Determine - **Not Enough Medicaid Information** (cannot admit without an evaluation)

## **Screening was not completed. Will Need a Screening prior to Admission:**

- **Administrative Closure** due to Case Withdrawn, Discharged Elsewhere, or Incomplete Referral.

### Mental Health Evaluation

- Kepro will complete a face-to-face evaluation once all required documentation has been received.
- Make sure to send the following documentation to avoid an administrative closure:
  - **Authorization for Release of Health Information (DOH-5032)**
  - **Completed OMH PSYCKES Consent Form (completed with initial screening request)**
- To be submitted with the initial screening request when there is not enough Medicaid history, or when a mental health evaluation is requested:
  - **Medical Evaluation (including a medication list)**
  - **Summary of Interview by Adult Home**
- Additional supporting documentation that will assist the evaluator in completing the evaluation may be submitted with the request for a mental health evaluation (accompanied by appropriate consent forms). Examples are:
  - **Minimum Data Set (MDS), if residing in a nursing facility**
  - **Treatment Notes from a behavioral health provider**
- Documents can be uploaded, emailed to us at [TAH\\_Assessments@kepro.com](mailto:TAH_Assessments@kepro.com), or faxed to us at 718-816-3560.
- MH Evaluations will be completed within **7 business days** of the request.

# MH Evaluation Outcomes

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## Possible Outcomes:

- Confirmed SMI - **Not Suitable for Admission** without a waiver
- MH Needs Can Be Met in ACF - **Suitable for Admission**

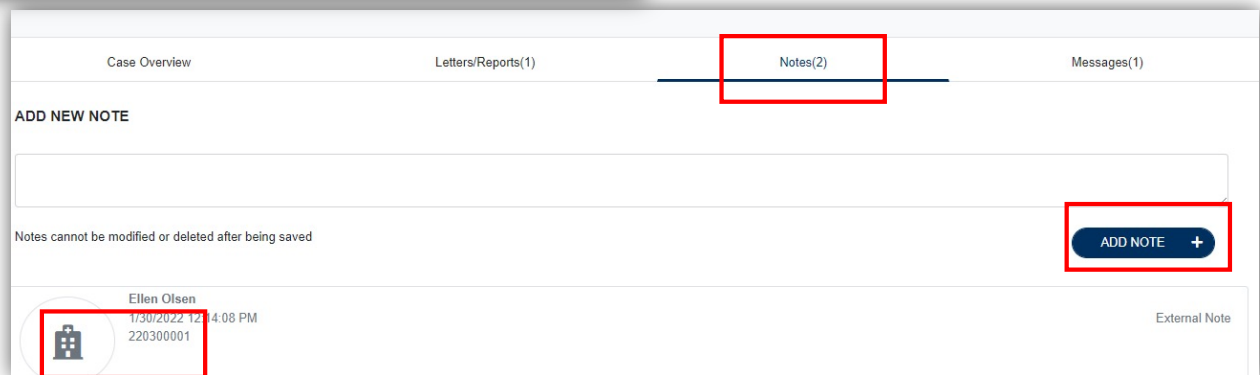
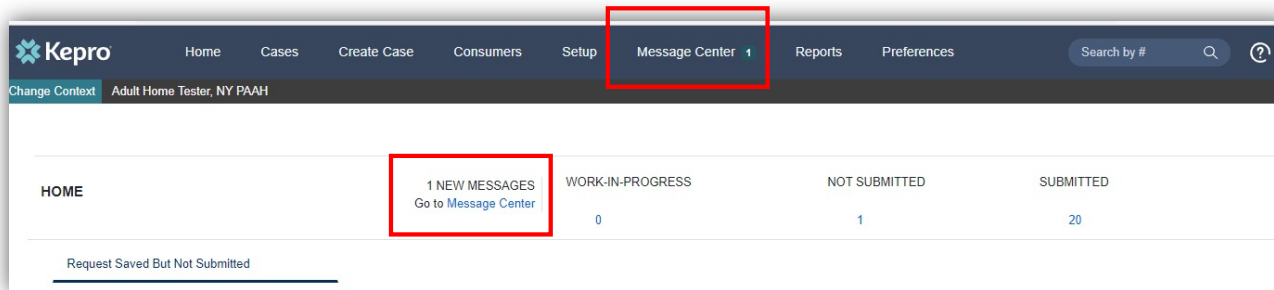
## Evaluation was not completed. Will Need a MH Evaluation prior to Admission:

- **Administrative Closure** due to Case Withdrawn, Discharged Elsewhere, or Incomplete Referral

## Review Case Notes & Messages

### What to Know?

- Messages from Kepro about the case will be accessible from the **MESSAGE CENTER** on the top navigation pane as well as directly within the **CASE** in the Messages tab. Kepro will also add notes to the case that can be viewed at any time.
- You can add additional documents within the **Case Overview** section and add or view notes within the **Notes** section.



# Additional Resources & Support

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## Contact Info

 Toll-free 888-612-1851

 TAH\_Assessments@kepro.com

 Fax: 718-816-3560

<https://NYassessments.kepro.com>

