VDC Assessment Checklist

# **Email outline ADNA Referral**

[ ]  ADNA Case Management (CM) Point of Contact (POC) emails the VDC Coordinator to acknowledge receipt of referral within one business day

[ ]  ADNA CM POC notifies VDC Coordinator when the ADNA CM is assigned

# **Telephone outline ADNA Case Manager**

[ ]  VDC Coordinator sends the draft spending plan with budget pre-populated to the assigned ADNA CM

[ ]  ADNA CM contacts Veteran within 2 business days of receiving the referral to schedule a home visit

# **Work from home house outline Initial Home Visit**

[ ]  Within 5 business days of receiving a referral, the ADNA CM conducts a face-to-face home visit with the Veteran (notify VDC Coordinator if unable to schedule within time period).

At home visit the ADNA CM :

 [ ]  Provides overview of VDC program

 [ ]  Completes person-centered assessment

 [ ]  Completes [*Tempus Consumer Referral*](https://tempusunlimited.org/ma-veterans-directed-care-program/) and [*MA VDC Veteran And ADNA Agreement*](https://tempusunlimited.org/ma-veterans-directed-care-program/) forms

 [ ]  Completes[*VDC Veteran Tasks Agreement*](https://tempusunlimited.org/ma-veterans-directed-care-program/)

[ ]  Reviews [*HHA Transition Process*](https://tempusunlimited.org/ma-veterans-directed-care-program/)

 [ ]  Reviews draft spending plan and budget

 [ ]  Reviews background check requirements/process for Authorized

 Representative (AR) and employees

 [ ]  Develops a plan for completion of documents and enrollment in VDC program.

\*Tempus forms and PaperWorkr [link](https://tempusunlimited.org/ma-veterans-directed-care-program/)

# **Clipboard outline Assessment Period**

After the home visit, the ADNA CM:

[ ]  Sends a copy of the person-centered assessment and *VDC Veteran Tasks Agreement* to the VDC Coordinator

[ ]  Submits the completed [*Tempus Consumer Referral*](https://tempusunlimited.org/ma-veterans-directed-care-program/), [*VDC Veterans Task Agreement*](https://tempusunlimited.org/ma-veterans-directed-care-program/) and [*MA VDC Veteran and ADNA Agreement*](https://tempusunlimited.org/ma-veterans-directed-care-program/) forms to generate a Tempus consumer number

[ ]  If AR is needed, submit background check once AR is identified

[ ]  Submit background checks for new employees once identified

[ ]  Coordinates regularly with Veteran/AR to assist with completion of all employer paperwork, onboarding employees, and to provide support with any questions or concerns

[ ]  Submit monthly contact notes to the VDC Coordinator at the end of each month

# **Enter outline Enrollment**

Once the ADNA CM receives confirmation from ADNA HR that all employees and AR

background checks have been completed and cleared, the ADNA CM:

[ ]  Reviews draft spending plan with Veteran/AR, updating as needed, confirms transition date for current HHA to VDC program, and obtains final signatures

[ ]  Submits signed spending plan to VDC Coordinator for review and approval. The VDC Coordinator will approve the spending plan, set the start date, and send via encrypted email the final spending plan to ADNA CM.

[ ]  ADNA CM adds approved start date to the employees I-9 forms and submits to Tempus with:

* Confirmation of completed Background checks for AR and employees
* Completed [*Tempus Employer Package* (AR)](https://tempusunlimited.org/ma-veterans-directed-care-program/)
* Completed [*Tempus New Hire Paperwork Package*](https://tempusunlimited.org/ma-veterans-directed-care-program/) for each employee
* Final approved Veteran spending plan

\*Tempus forms and PaperWorkr [link](https://tempusunlimited.org/ma-veterans-directed-care-program/)

#  **MISC**

* Assessment period can take up to 90 days from referral date to complete. ADNA CM must coordinate with VDC Coordinator if assessment period needs to be extended, otherwise, Veteran will be discharged after 90 days
* If Veteran is the employer, the completed [*Tempus Employer Package*](https://tempusunlimited.org/ma-veterans-directed-care-program/) can be submitted or uploaded thru [PaperWorkr](https://tempusunlimited.org/ma-veterans-directed-care-program/) at any point during the assessment period. If the employer is the identified AR, the completed [*Tempus Employer Package*](https://tempusunlimited.org/ma-veterans-directed-care-program/) cannot be submitted or uploaded thru [PaperWorkr](https://tempusunlimited.org/ma-veterans-directed-care-program/) until the background check has been completed.
* The employee [*New Hire Paperwork Package*](https://tempusunlimited.org/ma-veterans-directed-care-program/) cannot be submitted to Tempus until the background check has been completed and the start date has been determined by the VDC Coordinator. The start date on the employees I-9 must match the start date on the Veteran’s spending plan. Once Tempus onboards the employee, the employee can submit payroll back to the start date on the Veteran’s spending plan.
* Veterans cannot use their VDC budget before the approved start date set by the VDC Coordinator.