

# EAA Home Modification – Work Flow Chart

<p><b>Step 1 – Initial Lead Agency Review – General Parameters (consult with person)</b></p> <ul style="list-style-type: none"> <li>Determine the person’s general needs or goals for accessibility in their home (bathroom, front entrance, etc...).</li> <li>Review Person’s Eligibility and Budget Availability for EAA Home Modification.</li> <li>Will property owners be amenable to an EAA Home Modification project?</li> </ul> <p>Web Links: <a href="#">CBSM EAA</a> <a href="#">CBSM Waiver/AC Overview</a> <a href="#">Service Rate Limits PDF</a></p>
<p><b>Step 2 – Initial Lead Agency Review – Consider Project Complexities (consult with person) <span style="float: right;">((Pre-Assessment Inventory))</span></b></p> <ul style="list-style-type: none"> <li>Characteristics of Person - physical and cognitive abilities, progressive disability, multiple disabilities, vision or hearing issues, etc...</li> <li>Features of Property - steep grades, poor building condition, variance requirements, unusual layout, etc...</li> <li>SES/AT/DME - New or existing equipment that will need to be accounted for or incorporated into the EAA design.</li> </ul>
<p><b>Step 3 – Initial Lead Agency Review – Consider Project Scope and Services (consult with person)</b></p> <ul style="list-style-type: none"> <li>How might the person’s needs and goals best be met – DME, AT, other SES, Home Modification? Look at this with the person.</li> <li>What types of assessments may be appropriate - EAA Home Modification Assessment, AT Assessment, DME Assessment?</li> <li>What supplemental services may be appropriate - Scope of Work, Bid Management?</li> <li>Are specialized installation skills needed?</li> </ul>
<p><b>Step 4 - Assessment Phase – Select and Authorize Assessment Providers (as deemed appropriate based on initial review)</b></p> <ul style="list-style-type: none"> <li>EAA Home Modification assessment (if property or project is complex), supplemental services as appropriate.</li> <li>OT / PT / ATP (if disability is complex, SES/AT/DME present/needed, etc...).</li> <li>Specialized Installers (lifts, ramps, elevators, etc...) (if needed as part of assessment).</li> </ul> <p>Web Links: <a href="#">MinnesotaHelp</a> <a href="#">MHCP Provider Directory</a> <a href="#">CBSM Service Agreements</a></p>
<p><b>Step 5 - Assessment Phase – Complete Assessments</b></p> <ul style="list-style-type: none"> <li>Discuss assessment process with the person (who will be coming and why).</li> <li>Discuss project goals with assessment providers / meet on site if needed.</li> <li>Service providers complete assessments and submit reports (working with person to greatest extent possible).</li> </ul>
<p><b>Step 6 - Assessment Phase – Review and Approve Recommendations <span style="float: right;">((Bid Checklist))</span></b></p> <ul style="list-style-type: none"> <li>Review assessment reports and recommendations; and share between assessment providers as needed (EAA, SES, etc...).</li> <li>Discuss assessment results with person and confirm recommendations address their needs, goals, preferences, choices.</li> <li>Decide with person which recommendations to act upon for Home Modifications and SES (must meet DHS guidelines).</li> <li>Review with person what to expect as the Home Modification proceeds- dust, noise, time, contractor access and so on.</li> </ul> <p>Web Links: <a href="#">CBSM EAA</a> <a href="#">CBSM Guide to Home Mod</a></p>
<p><b>Step 7 - Assessment Phase – Obtain Bids</b></p> <ul style="list-style-type: none"> <li>Develop design drawings/specifications; or scope of work based on agreed recommendations (if needed for installation bids).</li> <li>Solicit bids for construction based on agreed recommendations; or using design drawings/specifications or scope of work.</li> <li>Obtain pricing for DME. Solicit bids for other SES/AT based on agreed recommendations.</li> </ul> <p>Web Links: <a href="#">MinnesotaHelp</a> <a href="#">MHCP Provider Directory</a> <a href="#">DOLI License Lookup</a></p>
<p><b>Step 8 - Assessment Phase – Review and Approve Bids</b></p> <ul style="list-style-type: none"> <li>Review bids and confirm they address the person’s assessed needs and goals.</li> <li>Confirm with assessment providers that the bids address their recommendations (if necessary).</li> <li>Review bids with person, agree on acceptable bids, discuss waiver/program service limits, discuss upgrades to be paid by person.</li> <li>Submit project summary and agreed bids for internal approval as needed; (additional square footage; increased budget limit).</li> </ul> <p>Web Links: <a href="#">CBSM EAA Additional Info</a> <a href="#">EAA Exception Request PDF</a> <a href="#">CBSM EAA Additional Sq Ft</a></p>
<p><b>Step 9 - Installation Phase – Select and Authorize Installation Providers <span style="float: right;">((Pre-Construction Checklist))</span></b></p> <ul style="list-style-type: none"> <li>Inform all parties of accepted and declined bids for construction.</li> <li>Implement service agreements with selected installation providers (upgrades are arranged directly between person and installer).</li> <li>Consider payment schedule such as 50% up front / 50% upon completion and write this into the service agreement.</li> </ul> <p>Web Links: <a href="#">CBSM Guide to Home Mod</a> <a href="#">CBSM Service Agreements</a> <a href="#">CBSM Approval Option Service</a></p>
<p><b>Step 10 - Installation Phase</b></p> <ul style="list-style-type: none"> <li>Meet on site as needed to review project with the person and all service providers prior to start (pre-construction walk-thru).</li> <li>Establish timelines and check points with service providers and the person.</li> <li>Person signs the service agreement acknowledging project agreement at the pre-construction walk-thru, all parties keep a copy.</li> </ul>
<p><b>Step 11 - Installation Phase – Specialized Equipment and Supplies (SES)</b></p> <ul style="list-style-type: none"> <li>Arrange for purchase of DME (Medicare, TPL, Medicaid, Waiver/Program as appropriate).</li> <li>Inform all parties of approved and declined bids for AT and other SES.</li> <li>Arrange installation and/or training for all SES as needed.</li> </ul> <p>Web Links: <a href="#">CBSM Specialized Equipment</a> <a href="#">MHCP Provider Manual – SES Billing</a> <a href="#">Service Rate Limits PDF</a></p>
<p><b>Step 12 – Installation Phase - Final Walkthrough <span style="float: right;">((Final Walkthrough Checklist))</span></b></p> <ul style="list-style-type: none"> <li>Final walkthrough with the person, Lead Agency and installation providers at project completion.</li> <li>Verify all terms of service agreement complete. Identify and resolve any “punch list” items before final payment.</li> <li>All parties sign and get a copy of service agreement; (person, owners, service providers, lead agency, etc.).</li> <li>Final payment.</li> </ul>