## Step 1 – Initial Lead Agency Review – General Parameters (consult with person)
- Determine the person’s general needs or goals for accessibility in their home (bathroom, front entrance, etc...).
- Review Person’s Eligibility and Budget Availability for EAA Home Modification.
- Will property owners be amenable to an EAA Home Modification project?

Web Links: [CBSM EAA](#)  [CBSM Waiver/AC Overview](#)  [Service Rate Limits PDF](#)

## Step 2 – Initial Lead Agency Review – Consider Project Complexities (consult with person)
- Characteristics of Person - physical and cognitive abilities, progressive disability, multiple disabilities, vision or hearing issues, etc...
- Features of Property - steep grades, poor building condition, variance requirements, unusual layout, etc...
- SES/AT/DME - New or existing equipment that will need to be accounted for or incorporated into the EAA design.

((Pre-Assessment Inventory))

## Step 3 – Initial Lead Agency Review – Consider Project Scope and Services (consult with person)
- How might the person’s needs and goals best be met – DME, AT, other SES, Home Modification? Look at this with the person.
- What types of assessments may be appropriate - EAA Home Modification Assessment, AT Assessment, DME Assessment?
- What supplemental services may be appropriate - Scope of Work, Bid Management?
- Are specialized installation skills needed?

## Step 4 - Assessment Phase – Select and Authorize Assessment Providers (as deemed appropriate based on initial review)
- EAA Home Modification assessment (if property or project is complex), supplemental services as appropriate.
- OT / PT / ATP (if disability is complex, SES/AT/DME present/needed, etc...).
- Specialized Installers (lifts, ramps, elevators, etc...) (if needed as part of assessment).

Web Links: [MinnesotaHelp](#)  [MHCP Provider Directory](#)  [CBSM Service Agreements](#)

## Step 5 - Assessment Phase – Complete Assessments
- Discuss assessment process with the person (who will be coming and why).
- Discuss project goals with assessment providers / meet on site if needed.
- Service providers complete assessments and submit reports (working with person to greatest extent possible).

## Step 6 - Assessment Phase – Review and Approve Recommendations (Bid Checklist)
- Review assessment reports and recommendations; and share between assessment providers as needed (EAA, SES, etc...).
- Discuss assessment results with person and confirm recommendations address their needs, goals, preferences, choices.
- Decide with person which recommendations to act upon for Home Modifications and SES (must meet DHS guidelines).
- Review with person what to expect as the Home Modification proceeds- dust, noise, time, contractor access and so on.

Web Links: [CBSM EAA](#)  [CBSM Guide to Home Mod](#)

## Step 7 - Assessment Phase – Obtain Bids
- Develop design drawings/specifications; or scope of work based on agreed recommendations (if needed for installation bids).
- Solicit bids for construction based on agreed recommendations; or using design drawings/specifications or scope of work.
- Obtain pricing for DME. Solicit bids for other SES/AT based on agreed recommendations.

Web Links: [MinnesotaHelp](#)  [MHCP Provider Directory](#)  [DOLI License Lookup](#)

## Step 8 - Assessment Phase – Review and Approve Bids
- Review bids and confirm they address the person’s assessed needs and goals.
- Confirm with assessment providers that the bids address their recommendations (if necessary).
- Review bids with person, agree on acceptable bids, discuss waiver/program service limits, discuss upgrades to be paid by person.
- Submit project summary and agreed bids for internal approval as needed; (additional square footage; increased budget limit).

Web Links: [CBSM EAA Additioal Info](#)  [EAA Exception Request PDF](#)  [CBSM EAA Additional Sq Ft](#)

## Step 9 - Installation Phase – Select and Authorize Installation Providers (Pre-Construction Checklist)
- Inform all parties of accepted and declined bids for construction.
- Implement service agreements with selected installation providers (upgrades are arranged directly between person and installer).
- Consider payment schedule such as 50% up front / 50% upon completion and write this into the service agreement.

Web Links: [CBSM Guide to Home Mod](#)  [CBSM Service Agreements](#)  [CBSM Approval Option Service](#)

## Step 10 - Installation Phase
- Meet on site as needed to review project with the person and all service providers prior to start (pre-construction walk-thru).
- Establish timelines and check points with service providers and the person.
- Person signs the service agreement acknowledging project agreement at the pre-construction walk-thru, all parties keep a copy.

## Step 11 - Installation Phase – Specialized Equipment and Supplies (SES)
- Arrange for purchase of DME (Medicare, TPL, Medicaid, Waiver/Program as appropriate).
- Inform all parties of approved and declined bids for AT and other SES.
- Arrange installation and/or training for all SES as needed.

Web Links: [CBSM Specialized Equipment](#)  [MHCP Provider Manual – SES Billing](#)  [Service Rate Limits PDF](#)

## Step 12 – Installation Phase - Final Walkthrough (Final Walkthrough Checklist)
- Final walkthrough with the person, Lead Agency and installation providers at project completion.
- Verify all terms of service agreement complete. Identify and resolve any “punch list” items before final payment.
- All parties sign and get a copy of service agreement; (person, owners, service providers, lead agency, etc.).
- Final payment.