

The State of West Virginia
Bureau for Medical Services



Request for Quotation MED13003
Psychological Consultant Services

Offeror/Vendor:

Psychological Consultation and Assessment, Incorporated

202 Glass Dr.

Cross Lanes, West Virginia, 25313

(304) 776-7230, Fax Number: (304) 776-7247

Contact Person: Richard L Workman, President PC&A, Inc.

E-Mail Address: rworkman@pcasolutions.com

	8/2/12
Vendor Signature	Date



**RFQ MED 13003
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Attachment A: Vendor Response Sheet

PC&A Incorporated staff includes four licensed psychologists, one licensed professional counselor, one project manager, one electronic data receipts coordinator, one CDCSP administrative assistant, one data entry specialist, a contracted registered nurse, and a contracted IT specialist. PC&A has provided consultative services to the Bureau for Medical Services since 1983. Since 2008, the management of the ICF/MR program, including initial eligibility determinations and annual redeterminations, review of ICAPs for accuracy, notifications to members and providers, training, data retention, etc. has been provided. Additionally, the CDCSP program has been managed through PC&A. Eligibility determinations, annual redeterminations, notifications to family members, data retention, and all other aspects of the program have been managed through PC&A. It has also been the responsibility of PC&A to make eligibility determinations and redeterminations for the I/DD Waiver program. Our office works cooperatively with the ASO in rendering these decisions and we also participate in fair hearings for any adverse decision. We have also designed, developed, recruited, and coordinate the Independent Psychologist Network that completes the I/DD Waiver evaluations. Additionally, we have designed, developed, recruited, and coordinate the PASRR Level II evaluators for the PASRR Level II program. The staff at PC&A also completes desk reviews and other Level II evaluations as needed. Enclosed you will find a copy of the multiyear report addressing most of the areas identified in this RFQ. Also, please find copies of resumes and samples of work products reflecting the level of expertise of our office and our thorough understanding of the responsibilities required to meet the demands of this RFQ.

PC&A endorses a systems approach to service delivery and views itself as a component of a much larger and complex service system. We believe people will be effectively served when they receive services from the system at large. Our significant effort within the service system includes cooperation and communication with the Bureau for Medical Services, participants, families, legal representatives, service providers and other BMS vendors. PC&A is also committed to continuous quality improvement. The use of a strategic planning process allows multilevel participation in the development of goals and objectives for quality improvement. Quarterly internal quality reviews allow PC&A to effectively determine operational compliance with State and Federal guidelines, and contractual standards with the Bureau for Medical Services. PC&A Contract Report 2008-2011 has been included as an overview of previous performance and successful methodologies employed. Upon award of the contract, PC&A will meet with BMS to review the approach, tasks, and timeline for implementation of an approved work plan.



Richard L. Workman, MA
President PC&A, Inc
Licensed Psychologist
BMS-LTC Clinical Consultant
202 Glass Drive
Cross Lanes, WV 25313

LICENSURE

West Virginia Licensed Psychologist # 287
October 1, 1981
West Virginia School Psychologist # 22010
April 1, 1992

PROFESSIONAL EXPERIENCE

Established PC&A, Inc. on August 1, 1979.

Services Include:

Psychological assessments, individual therapy, group therapy, participant on multidisciplinary teams, workshop presenter, EAP services, contracted consultant with government agencies.

School Psychology Experience:

Contract psychologist consultant for Putnam County Schools
August 1979 to June 1999

Staff psychologist for Kanawha County Schools
August 1976 to July 1979

Teaching Experience:

Part-time instructor in psychology; West Virginia State College
September 1976 to May 1979
Graduate Assistant; Marshall University Spring 1976

Psychologist Consultant for the Bureau for Medical Services-responsibilities include:

ICF/ MR reviews, ICAP reviews, eligibility determinations for I/DD Waiver, CDCSP, and ICF/MR programs. Participate in fair hearings, staff training, and coordinate the Level II Process and the IPN.
December 1983 to present

Additional Experience:

Secretary for the Board of Examiners of Psychologists
October 1987 to April 1989

Therapist-Division of Alcoholism and Drug Abuse; state of West Virginia-Guthrie Center
February 1983 to August 1974



Military History: Drug and alcohol counselor under direct supervision of a licensed psychologist at Walter Reed Army Medical Center
May 5, 1971 to February 8, 1973

PROFESSIONAL MEMBERSHIP

West Virginia Psychological Association
1977 to 2011
WVPA Representative-at-Large January 2008 to December 2010

Secretary WV Board of Examiners of Psychologists May 1988 to May 1989

West Virginia Association of Professional Psychologists-Charter Member
Spring 2012 to present

EDUCATION

Master of Arts-Clinical Psychology; Marshall University
August 1976

Bachelor of Arts-Psychology; West Virginia State College
December 1974

US Medical Field Service School, Fort Sam Houston, Texas
Social Work/Psychology Procedures Course
July 1971



West Virginia Board of Examiners of Psychologists

Be It Known That:

Richard L. Workman, MA

License Number 287 has met the requirements of the law, and is
 duly licensed, and is entitled to practice in the state of West Virginia until
9/30/2013 as a Psychologist.

Licensed Since: 10/1/1981

Jerry Lawrence Seigley MA
 Secretary



West Virginia Board of Examiners of Psychologists

Be It Known That:

Richard L. Workman, MA

License Number 22010 has met the requirements of the law, and is
 duly licensed, and is entitled to practice in the state of West Virginia until
9/30/13 as a School Psychologist Independent Practitioner.

Jerry Lawrence Seigley
 Secretary since 4/1/92



Linda O. Workman
Licensed Psychologist
PC&A, Inc.
202 Glass Drive
Cross Lanes, WV 25313

LICENSURE

West Virginia Licensed Psychologist # 273
April 1, 1981
West Virginia School Psychologist #22009
April 1, 1992

PROFESSIONAL EXPERIENCE

Psychologist, Kanawha County Schools
December 1975 –March 1981

Psychological Consultation and Assessment, Inc.
March 1981 to present. Duties have included individual psychotherapy, psychological assessment, LTC-CC, workshop presentation.

School Psychology experience includes contractual assessments, participation in multidisciplinary teams, IEP development, in-service presentation for counties including Putnam, Mason, Wood, Lincoln, Boone, Clay, Calhoun and for the State Department of Education

Teaching experience includes: Part-time instructor West Virginia State University Fall of 1976 through Fall of 1981, Instructor of Industrial Psychology Marshall Community College, Graduate Assistant Proctor of Introductory Psychology Fall of 1974

Consultant for the Bureau for Medical Services experience includes: ICF/MR on-site reviews; reviews of day treatment programs; prior authorization of services for psychological services and crisis intervention; ICAP reviews; eligibility determination for ICF/MR, I/DD Waiver, CDCSP; participation in fair hearings; policy and manual development; training for IPN and eligibility requirements for the above programs.

PROFESSIONAL MEMBERSHIP

Member of the West Virginia Psychological Association from 1976 through 2011..
Secretary of WVPA from December of 1989 through December of 1991.
Representative at Large for WVPA from January 1992 through December 1993
Charter Member of the West Virginia Association of Professional Psychologists Spring 2012 to present

EDUCATION

Master of Arts, Marshall University December 1975
Bachelor of Arts in psychology, Marshall University May 1974
Additional graduate hours in psychology from West Virginia College of Graduate Studies



West Virginia Board of Examiners of Psychologists
Be It Known That:

Linda O. Workman, MA

License Number 273 has met the requirements of the law, and is
 duly licensed, and is entitled to practice in the state of West Virginia until
3/31/13 as a Psychologist.

Licensed Since: 4/1/81

Jerry Lammie Sigley MA
 Secretary



West Virginia Board of Examiners of Psychologists
Be It Known That:

Linda O. Workman, MA

License Number 22009 has met the requirements of the law, and is
 duly licensed, and is entitled to practice in the state of West Virginia until
3/31/13 as a School Psychologist Independent Practitioner.

Jerry Lammie Sigley MA
 Secretary since 11/92



Kerri A. Linton, MA, LPC
Licensed Psychologist #852
BMS-LTC Clinical Consultant
PC&A, Inc.
202 Glass Drive
Cross Lanes, WV 25313

LICENSURE

WV-Licensed Psychologist #852
3-7-2003
WV-Licensed Professional Counselor #1521
5-31-2000

PROFESSIONAL EXPERIENCE

PC&A
Licensed Psychologist/LPC/LTC-Clinical Consultant
October 2008-present
Responsibilities include psychological evaluations and outpatient therapy for children, adolescents and adults in a private practice setting. Determine eligibility for applicants to the I/DD Waiver program. Complete desk reviews for the PASRR program to determine nursing facility placement. Provide training and technical assistance for members of the Independent Psychologist Network.

Mountain State University
Adjunct Faculty in the Arts and Sciences Program
August 2005-August 2012
Instructor for psychology and sociology courses in a variety of teaching modalities to include: spectrum, independent study and traditional courses.

Cornerstone Psychological Services
Licensed Psychologist/LPC
October 2007-September 2008
Conduct psychological evaluations and outpatient therapy for children, adolescents and adults in a private practice setting.

Bodyworks Health Fitness and Rehabilitation
Staff Psychologist
August 2006-August 2008
Provide evaluations and treatment for individuals in the PEIA Weight loss program.

Sunrise Psychiatric Services, Inc.
Licensed Psychologist/LPC
March 2003-March 2007
Conduct psychological evaluations and outpatient therapy for children, adolescents and adults in a private practice setting.

Sunrise Psychiatric Services, Inc. & Laurel Ridge Psychological Associates
Supervised Psychologist/LPC
June 1998-March 2003
Conduct psychological evaluations and outpatient therapy for children, adolescents and adults in private practice settings under the supervision of licensed psychologists.

Beckley Psychiatric Associates & Timberline Health Group



Supervised Psychologist
July 1997-May 1998

Conduct psychological evaluations and outpatient therapy for children, adolescents and adults in private practice and behavioral health facility settings under the supervision of a licensed psychologist. Reviewed behavior plans and attended treatment team meetings.

PROFESSIONAL MEMBERSHIP

West Virginia Association of Professional Psychologist (WVAPP) Charter Member April 2012-present
West Virginia Psychological Association (WVPA) 1999-2010
Children and Adults with Attention Deficit Disorder (CHADD) 2002-2005

EDUCATION

PMA-Psychology
West Virginia University
August 1997

BA-Psychology
West Virginia University
May 1995



West Virginia Board of Examiners of Psychologists
Be It Known That:

Kerri A. Linton, MA

License Number 852 has met the requirements of the law, and is
duly licensed, and is entitled to practice in the state of West Virginia until
3/31/13 as a Psychologist.

Licensed Since: 3/7/03

Mary Louisa Sigley MA
Secretary



Kristen M. Blanks, M.A.
Licensed Psychologist #958
BMS LTC Clinical Consultant
PC&A, Inc.
202 Glass Drive
Cross Lanes, WV 25313

LICENSURE

West Virginia Psychology License # 958
October 2007
West Virginia Social Worker (license currently inactive)
December 1995

PROFESSIONAL EXPERIENCE

Psychologist/Clinical Consultant PC&A, Inc. November 2009 to Present

Services Include:

Psychological assessments, individual therapy, workshop presenter, EAP services, contracted consultant with government agencies. ICF/ MR reviews, ICAP reviews, eligibility determinations for ICF/MR programs. Participate in fair hearings, staff training, and coordinate the Level II Process.

Independent Psychologist/Blanks Psychological Services August 2008 to November 2009

Services Include:

Psychological assessments, behavior support training, assessment, plan development, data review, and treatment planning for ICF/MR and Title XIX Waiver for ResCare Huntington Agency and Charleston Agency. Psychological assessments for Disability Determination Services and New Horizons Therapy Services. Level II evaluations.

Psychologist Martin & Associates and Green Acres Regional Center November 2001 to August 2008

Services Include:

Psychological assessments, behavior support training, assessment, plan development, data review, and treatment planning for ICF/MR and Title XIX Waiver for ResCare Huntington Agency and Charleston Agency. Psychological assessments for Disability Determination Services and New Horizons Therapy Services. Level II evaluations.

PROFESSIONAL MEMBERSHIP

West Virginia Association of Professional Psychologists-Charter Member
Spring 2012 to present

EDUCATION

Master of Arts-Clinical Psychology; Marshall University
August 2001

Bachelor of Arts-Social Work; Marshall University
May 1995



West Virginia Board of Examiners of Psychologists

Be It Known That:

Kristen M. Blanks, MA

License Number 958 has met the requirements of the law, and is
duly licensed, and is entitled to practice in the state of West Virginia until
9/30/2013 as a Psychologist.

Licensed Since: 10/12/2007


Secretary



Mekell L. Golden
PC&A BMS LTC Project Manager
PC&A, Inc.
202 Glass Drive
Cross Lanes, WV 25313

PROFESSIONAL EXPERIENCE

PC&A BMS LTC Project Manager August 2008-Present

- Developed with the Program Director, PC&A BMS LTC Project Policy and Procedure Manual which provides the policies and procedures that govern the PC&A BMS LTC Project and define the role of PC&A as an independent contractor for the WV DHHR Bureau for Medical Services.
- Provide administrative oversight of all work performed under the PC&A BMS LTC Project in managing the provision of Medicaid services to applicants and recipients in the WV PASRR Program, WV Children with Disabilities Community Services Program, WV Intermediate Care Facility/Mental Retardation Facilities, WV I/DD Waiver Program, the WV Office of the Inspector General Board of Review, the WV Office of the Attorney General, and Center for Medicaid Services.

Administrative Responsibilities include:

- Maintenance of policies and procedures
- Coordination and training of all program staff to meet contract deliverables.
- Communication and cooperation within the service system which includes CMS, WV BMS, state departments, participant's families, legal representatives and other service providers. Attending monthly contract meetings as required.
- Ensure office computer systems are secure and compatible with industry standards.
- Coordination and maintenance of all member records and compliance of all HIPPA requirements.
- Oversight of initial and annual medical eligibility determinations and notification of determinations.
- Assist in the development of the process and interface with the BMS claims fiscal agent to generate authorizations for services for the ICF/MR participants.
- Coordinates and provides the BMS claims fiscal agent with the necessary information to generate authorizations for services for the ICF/MR participants.
- Coordinate Medicaid Fair Hearings in conjunction with the WV Board of Review and the Office of the Attorney General to ensure due process.
- Developed the PC&A BMS LTC Quality Management Plan to ensure operational compliance with State and Federal guidelines, as well as contractual standards.
- Coordinates and facilitates quality improvement activities.
- Monitors quality improvement process through review of data elements that include, determinations completed and timelines, eligibility decisions, Fair Hearing status and decisions, and training and education conducted. This includes oversight of the CMS Quality Improvement Assurances and multiple Performance Measures for the I/DD Waiver program.
- Develop and initiate Quality Improvement Plans to ensure quality of service is provided.
- Provide daily, weekly, monthly, or ad hoc data collection, data analysis, and data reporting on to meet contract deliverables.
- Develop and implement statewide training programs and materials in an effort to assist other provider agencies and tracking of certified/trained/approved evaluators.
- Developed and implemented electronic records system.



ResCare of WV 2004-2008
Quality Assurance Manager

- Coordinated and implemented quality systems
- Coordinated implementation of employee orientation and training
- Developed and implemented systems to improve operations
- Developed systems of Incident Management
- Safety systems management

ResCare of WV 1999-2004
Clinical Supervisor

- Supervised operations to ensure compliance with regulatory requirements
- Supervised activities to ensure maximum attention to participant needs, rights protection, and safety by utilizing company mission, goals, values, and practices.
- Coordinated clinical service delivery to ensure the provision of quality services for all assigned consumers.
- Fostered a positive work environment by ensuring appropriate employee selection, training, development, and recognition.
- Supervised the implementation of fiscal processes and loss control programs, and ensures appropriate allocation and use of financial resources.

VOCA of WV 1995-1999
Home Supervisor

- Supervised assigned home to ensure compliance with contractual, legal, and regulatory requirements.
- Supervised activities to ensure maximum attention to consumer needs, rights, protection and safety, while ensuring the provision of quality services and supports.

PROFESSIONAL MEMBERSHIP

River Valley Child Development Board of Directors 2004-2008

EDUCATION

BA Psychology
West Virginia University 1998



Ashley B. Zawodniak, RN
BMS-LTC Clinical Consultant
202 Glass Drive
Cross Lanes, WV 25313

LICENSURE

West Virginia Registered Nurse #69599
January 4, 2007

PROFESSIONAL EXPERIENCE

-
- 2008-Present Cammack Children's Center
Huntington, WV
Registered Nurse. – Perform nursing audits monthly.
- 2008- Present PC&A, Inc.
Cross Lanes, WV
Registered Nurse Consultant – Reviewed eligibility for CDCSP.
- 2007-2009 Charleston Area Medical Center
Charleston, WV
Registered Nurse – Provided direct care for patients.
- 2007-2009 ResCare, Inc.
Huntington, WV
Registered Nurse – Managed medical care of adults with mental retardation.
- 2006 - 2007 Kings Daughter's Medical Center
Ashland, KY
Registered Nurse – Provided direct care of patients on Cardiac Step-Down Unit.

PROFESSIONAL MEMBERSHIP

-
- 2004 - 2006 Student Representative for Academic Curriculum Committee
- 2005 – 2006 President of Marshall University's Student Nurses Association
- 2005 – 2006 Student Co-coordinator for Nursing Graduation Ceremony.
- 2006 Mistress of Ceremony for Marshall University School of Nursing.
- 2006 – 2007 Vice President for Nu Alpha Chapter of National Honor Society for Nursing.
- 2010 – 2011 Treasurer for Pediatrics Club, West Virginia School of Osteopathic Medicine.
- 2012 Co-developer for initiation of Remodulin therapy for pulmonary hypertension at St. Mary's Medical Center.



Other Awards/Accomplishments

- 2005 - Recipient of West Virginia Nurses Association Scholarship.
- 2005 - Outstanding Junior Award for Marshall University.
- 2005 - Marshall University Leader / Scholar Award.
- 2006 - Who's Who Among Students in American Universities and Colleges.
- 2006- Spirit of Nursing Award for Class of 2006.
- 2006 - Outstanding Student in Nursing Award for Marshall University.
- 2010 - TOUCH Award for completing 200 hours of community service.
- 2011 - TOUCH Award for completing 280 hours of community service.
- 2012 Co-developer for initiation of Remodulin therapy for pulmonary hypertension at St. Mary's Medical Center.

EDUCATION

2009-2013 West Virginia School of Osteopathic Medicine
D.O. expected May 2013

1999-2006 Marshall University, Huntington WV
B.S. in Nursing, *Cum Laude*

Certifications

1998 - Present American Red Cross, CPR and AED certified

2006 – Present Registered Nurse

2006 - Present ACLS certified

Volunteer Experience

2005-2006 Participated and helped develop the First Annual "Wear Red" event to raise cardiac awareness on the campus of Marshall University.

2010-present Street Ministry to provide food, hygiene kits, and clothing for the homeless every Saturday morning in Huntington, WV.

2011-present Director of New Song Church's clothing pantry to provide clothing to the homeless.

2012 Medical Mission to Bolivia for 4 weeks. Served in the community and in orphanages.



8/2/12

WV Board of Examiners for Registered Professional Nurses License Search

TRADOR, ASHLEY

License Information

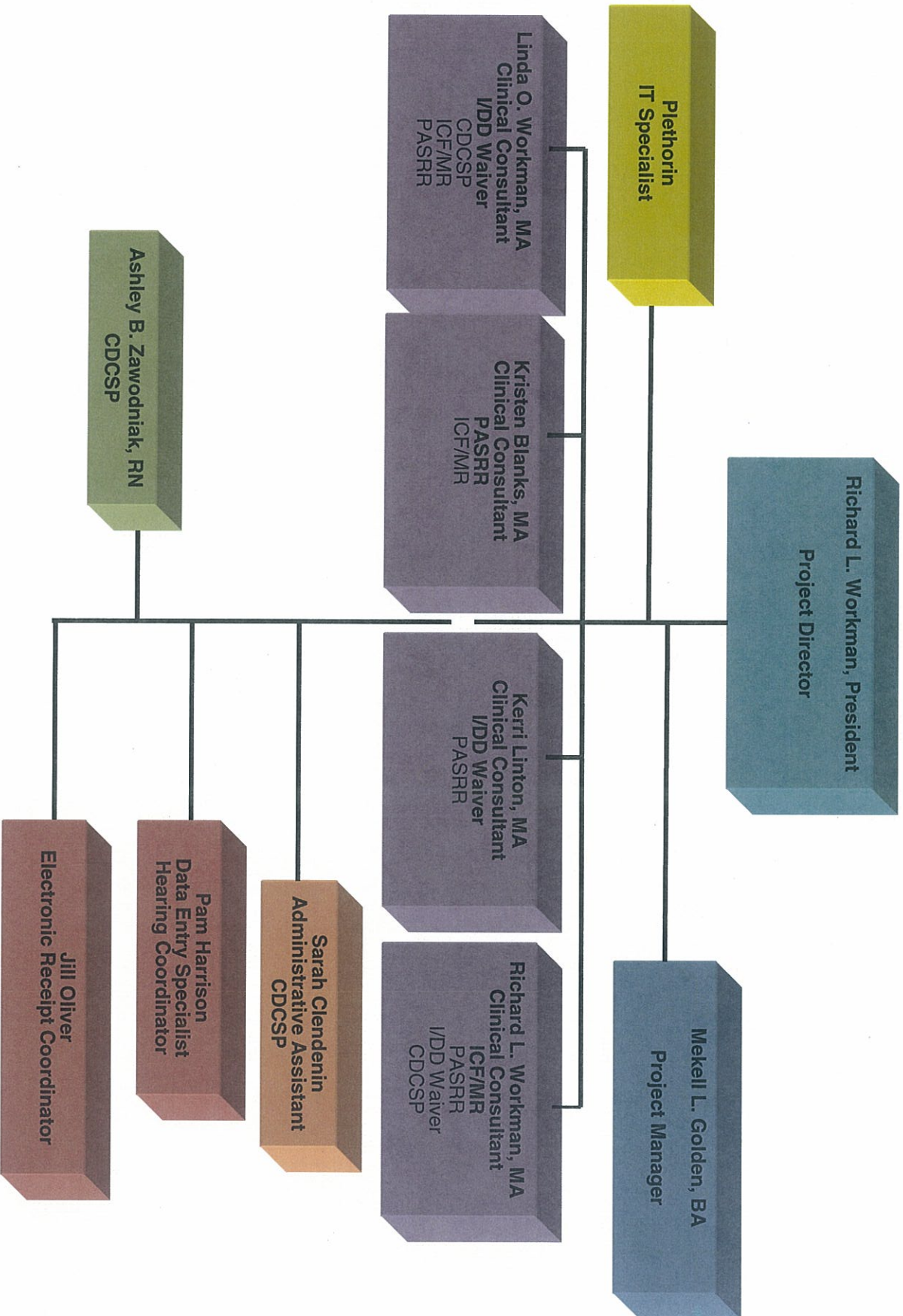
Address: HUNTINGTON, WV
License Number: 69599
Primary Status: Active
Secondary Status: N/A
License First Issued: 1/4/2007
License Expiration Date: 10/31/2012
License Renewal: N/A

Disciplinary Information: No disciplinary information in file.
Permanent license.

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West Virginia Department of Health and Human Resources
Bureau for Medical Services
Request for Quotation MED13003





Psychological Consultation & Assessment, Inc.

The Bureau for Medical Services

Long Term Care Project

Contract Report

July 2008 to June 2012

An extension was requested and services provided 07/01/2011 to present.

To be submitted to:

Kelley Johnson, MSW, LSW
Program Manager
Long Term Care and ICF/MR Facilities
Bureau for Medical Services
350 Capitol Street
Charleston, WV 25301
Phone : (304) 356-4886 Fax: (304) 558-1542
Email: Kelley.S.Johnson@wv.gov

Patricia S. Nisbet, MA, LSW
Program Manager
I/DD Waiver Program and Children with Disabilities Community Services Program
Bureau for Medical Services
Office of Home and Community-Based Services
350 Capitol Street, Room 251
Charleston, WV 25301
Phone: (304) 356-4904 Fax: (304) 558-4398
Email: Patricia.S.Nisbet@wv.gov

Report Prepared By:

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The Bureau for Medical Services
Long Term Care Project
mgolden@pcasolutions.com

Richard L. Workman, MA, Program Director
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The Bureau for Medical Services
Long term Care Project
rworkman@pcasolutions.com



Data Provided By:

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The Bureau for Medical Services
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rworkman@pcasolutions.com

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kblanks@pcasolutions.com

Ashley Trador Zawodniak, BSN
The Bureau for Medical Services
Long Term Care Project
Contracted RN through PC&A, Inc.

Bureau for Health and Health Facilities
Office of Behavioral Health Services
Division of Developmental Disabilities
Title XIX Home and Community Based Waiver Program



Introduction:

The Bureau for Medical Services 2008-2012 Psychological Services contract (BMS 90002) provided Psychological Consultation & Assessment, Inc (PC&A) with opportunities to assist WV Medicaid Long Term Care improve Home and Community Based programs and services offered to the most disadvantaged citizens of West Virginia. PC&A, a contracted agent, functions as an Administrative Service Organization (ASO) for the Bureau for Medical Services. PC&A has had four (4) successful years of transitioning operational services from within the Bureau to its offices in Cross Lanes, West Virginia. During this four (4) year transition, operational procedures were implemented, performance measures were created and reported, and fiscal oversight was provided.

PC&A employs and contracts a diverse group of eleven individuals. During the 2008-2012 contract, PC&A employees undertook several actions to achieve the goals of improving the provision of medical eligibility and administration of Medicaid programs to applicants and members.

The clinical consultants reported the following:



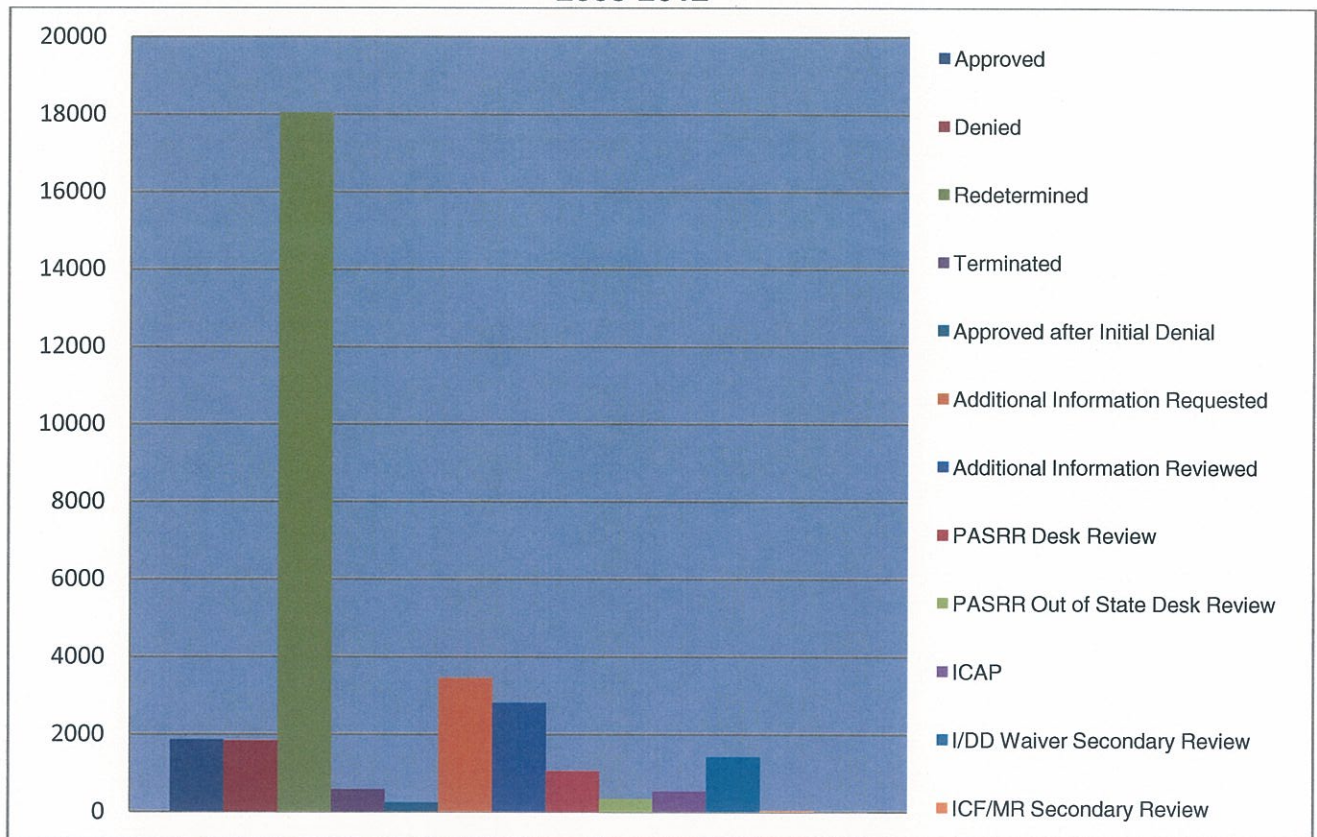
Statistical Data

Contract Report July 2008-June 2012

Based upon review of the data reported by the LTC-CC together with hard copy files for the contract year 2008-2012, **32,091** reviews and determinations were completed. For that time period, **1852** applicants were approved, and **1826** denied, **18,037** members were re-determined eligible, **575** members were found to be ineligible for redetermination, and **228** applicants were approved after an initial denial. Additional information was required for eligibility determinations for **3439** participants, additional information requested was reviewed for **2799** participants. PASRR data reflects **1042** Desk Reviews and **331** Desk Reviews were completed for individuals placed in out of state facilities. Additionally, **530** Inventory for Client and Agency Planning (ICAP) Response Booklets were reviewed for the ICF/MR program. Secondary Reviews were provided for **1407** I/DD Waiver applicants/participants and **25** ICF/MR applicant/participants. Refer to Chart 1 for data.

Chart 1

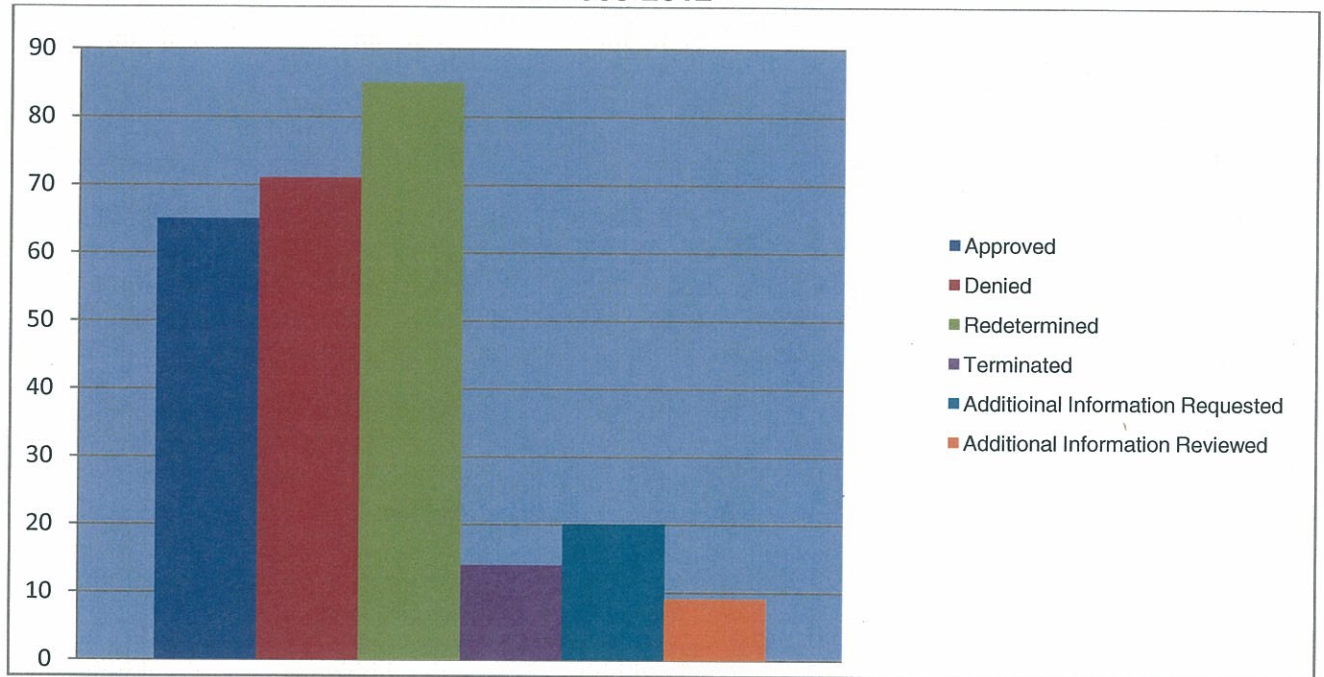
Total Evaluation Data
2008-2012





CDCSP data for this contract include: **65** initial applicants were certified, **71** applicants were denied, **85** members were re-determined eligible, **14** members were found ineligible for re-determination, additional information was required for **20** applicants for an eligibility determination, and additional information requested was reviewed for **9** participants. Refer to Chart 2 for data.

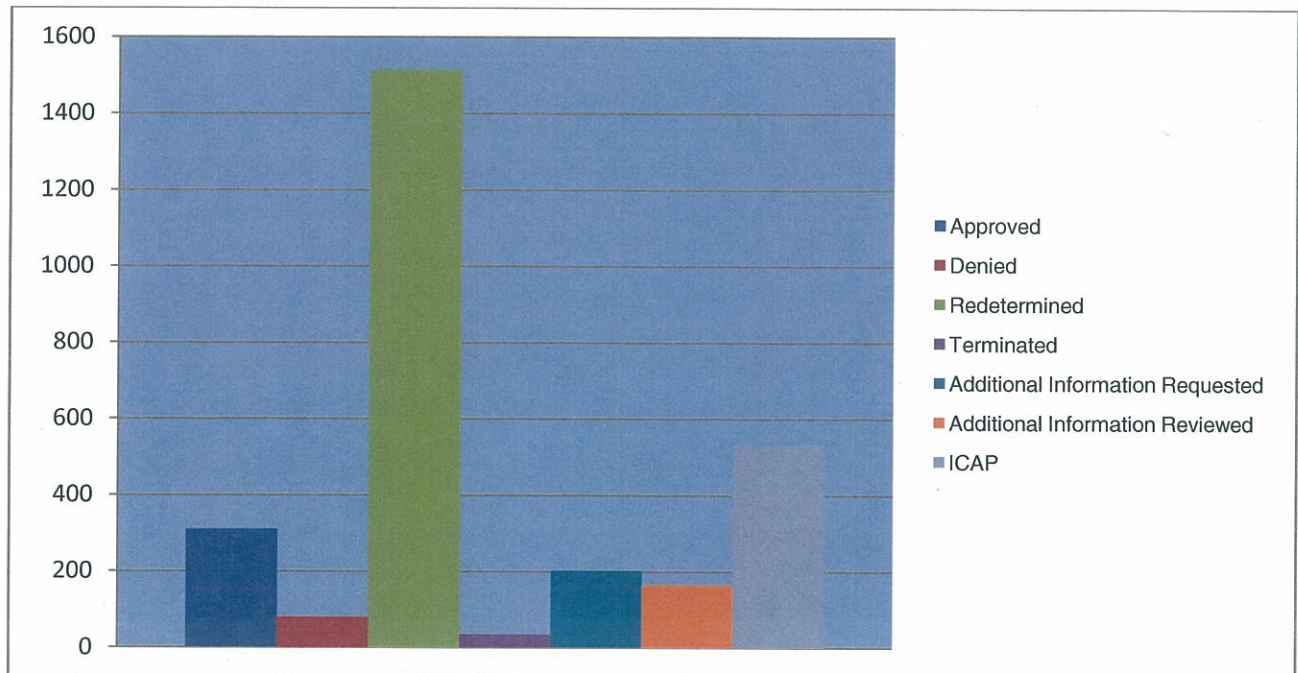
Chart 2 **CDCSP Review Data**
2008-2012





ICF/MR data include: **309** initial determinations, **79** applicants were denied, **1513** members were re-determined eligible, **34** members were found ineligible for redetermination, additional information was required for eligibility determinations for **201** participants, and additional information requested was reviewed for **164** participants. Additionally, **530** Inventory for Client and Agency Planning (ICAP) Response Booklets and supporting documentation were reviewed for accuracy regarding reimbursement rate setting. Refer to Chart 3 for data.

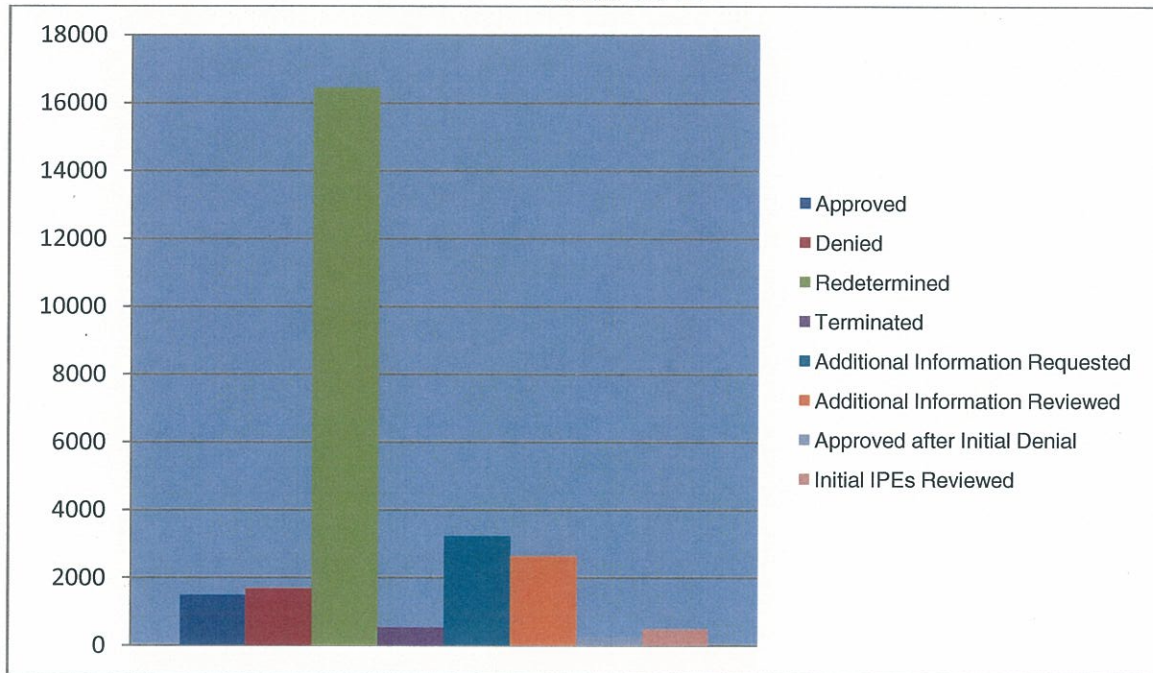
Chart 3 **ICF/MR Review Data**
2008-2012





I/DD Waiver data include: **1478** initial certifications, **1676** applicants were denied, **16,439** members were re-determined eligible, **527** members were found ineligible for re-determination, additional information was required for eligibility determination for **3218** applicants/members (mostly demographic errors and lack of information), additional documents were reviewed for **2626** participants, **228** applicants/members were approved after initial denial, and **466** IPE's were reviewed in 2011-2012. Refer to Chart 4 for data.

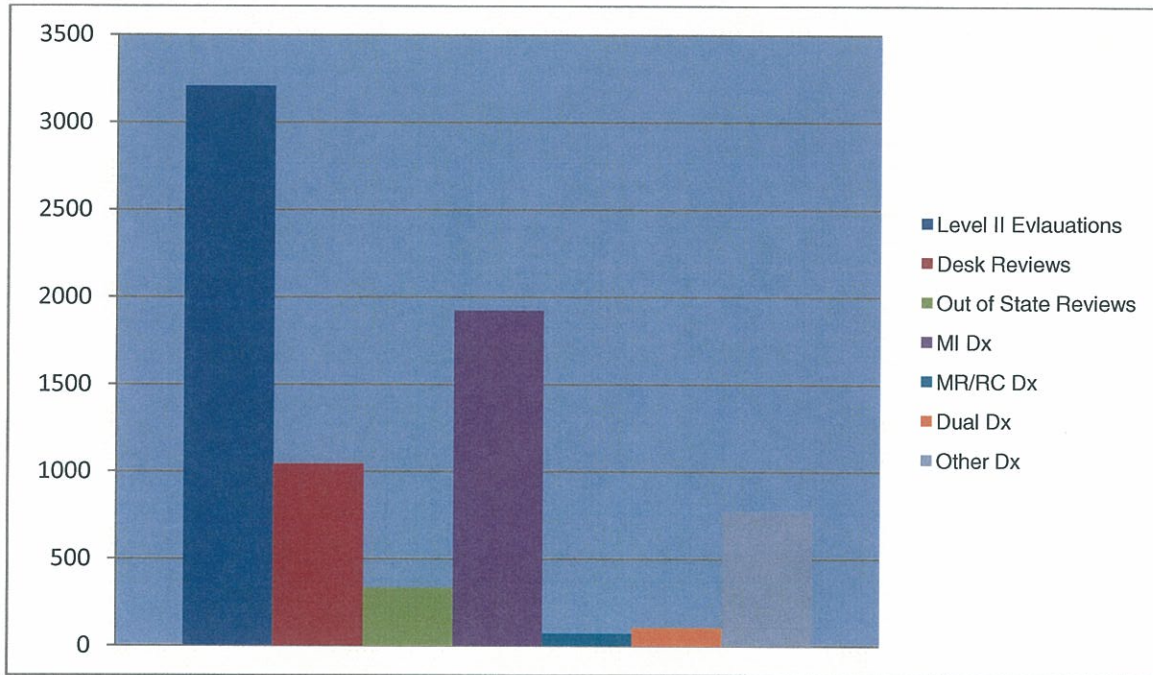
Chart 4 **I/DD Waiver Data**
2008-2012





PASRR data includes: **3208** Level II evaluations were completed, **1042** Desk Reviews were completed, and **331** individuals were reviewed from out of state. Diagnoses included: **1921** Mental Illness (MI), **69** Mental Retardation or Related Condition (MR/RC), **102** Dual, and **771** other (a diagnosis other than mental retardation or related condition). Refer to Chart 5 for data.

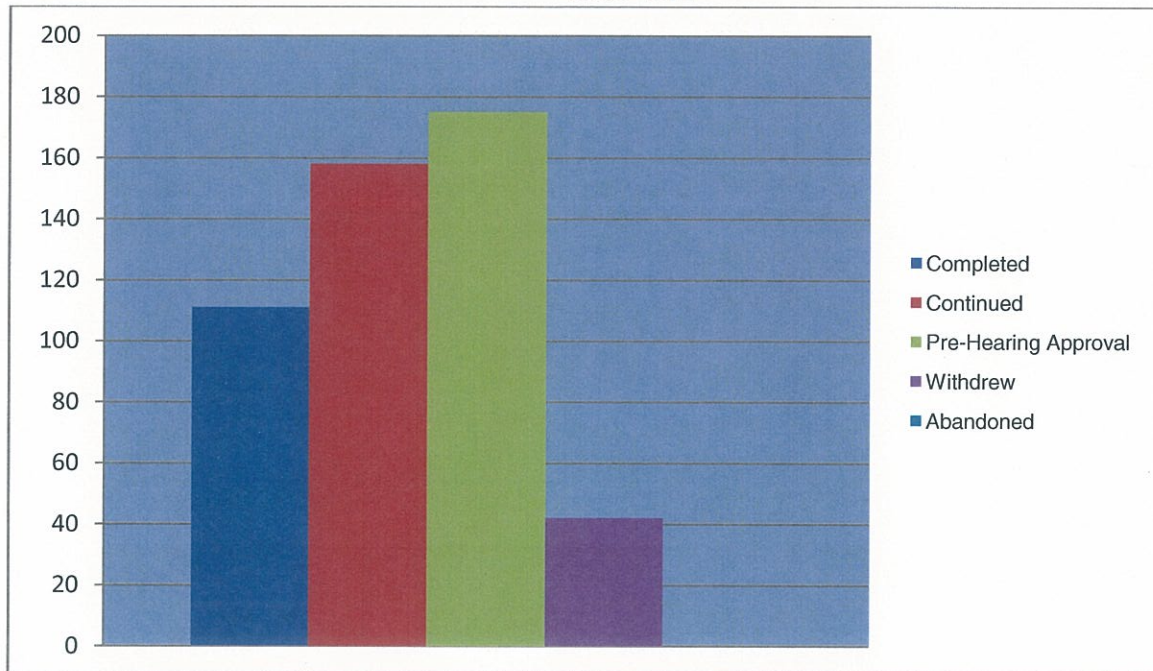
Chart 5 PASRR Review Data
2008-2012





Fair Hearing data includes: **358** hearings for MR/DD Waiver/CDCSP were scheduled, of those 358, **111** were completed, **158** were continued/remanded. The other hearings resulted with the following: pre-hearing approval **175**, **42** withdrew, and **41** abandoned. Hearing preparation occurred for **358** scheduled hearings. The data regarding decisions are inconclusive as decisions may not be available on a timely basis and may not be adequately linked to the month in which the decision is received. Refer to Chart 6 for data.

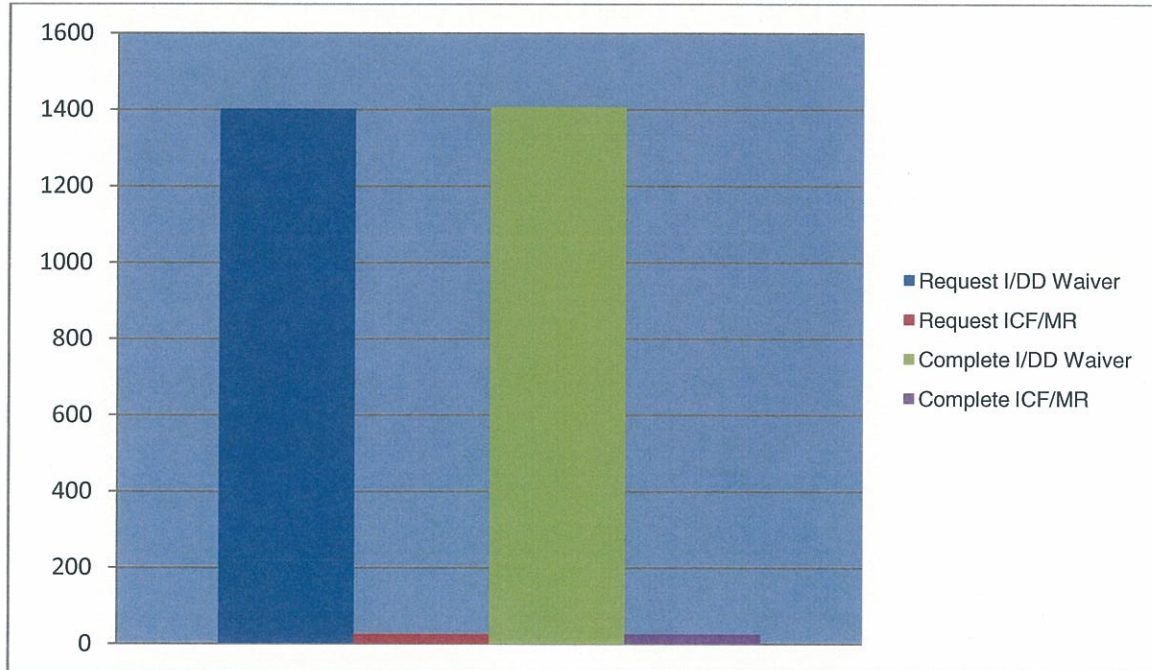
Chart 6 Fair Hearing Data
2008-2012





Quality Assurance/Secondary Review data includes: **1402** requests for an I/DD Waiver Secondary Review, **25** requests for ICF/MR Secondary Review. **1407** I/DD Waiver Secondary Reviews were completed and **25** ICF/MR Secondary Reviews were completed and **0** PASRR secondary reviews were requested. Refer to Chart 7 for data.

Chart 7 **Secondary Review Data**
2008-2012





Training data includes: **80** trainings were provided by PC&A during the four years of the contract. A sample of these trainings include: **2009-2010:** During this contract year, **26** trainings were provided. During the month of May 2009, PC&A LTC-CCs were trained by the PC&A Program Director in preparation for the changes regarding the Inventory for Client and Agency Planning review process. Also this month, two (2) trainings occurred for the WV PASRR program. PC&A provided training regarding the Level II process on two different occasions for Dr. James Pittrick and the WVCHA. In June of this year, six (6) trainings were provided to LTC-CC's and providers of the ICF/MR program to ensure the ICAP review process was implemented accurately. In contract year **2010-2011:** **28** trainings were provided. For the first quarter (July-September 2010) eight (8) trainings were offered by PC&A. Two ICAP trainings in Romney and Beckley, WV for ICF/MR participating providers, training outcomes included, the ICAP as a valuable tool, how to rate Adaptive skills and Maladaptive behavior, and how to utilize other sections of the ICAP booklet. Six (6) PASRR trainings occurred the first quarter. Training outcomes included, understanding the need for the PAS, the Level II process, roles and responsibilities, know who to contact, closing the loop, and data retention. In the second quarter (October-December 2010) PC&A presented an overview of the CDCSP to the Department of Health and Human Services Region 1 Social Services Supervisors in Parkersburg. During the third quarter (January –March 2011) The Independent Psychologist network was presented by PC&A. Four trainings and two webinars were presented to 75 psychologists across the state interested in participating. Additionally, PC&A consulted with APS Healthcare regarding the Complete Care Connection. PC&A reviewed the Level II process as implemented via the Care Connection. During the last quarter of this contract year, ICAP training was provided to seventeen provider participants regarding accurate rating of the ICAP assessment. **2011-2012:** **26** trainings occurred. During the first quarter (July-September 2011) a webinar was offered for CDCSP participants and providers regarding CDCSP targeted population, Level of Care, Medical Eligibility, Financial Eligibility, eligibility determinations, forms, and process for re-determination. Three (3) webinars were offered this quarter to update members of the Independent Psychologists Network in preparation for the October 1 start date of the new I/DD Waiver medical eligibility process. Several impromptu trainings also occurred as a result of I/DD Waiver document errors during electronic transfer. PC&A Program Manager participated in several meetings and conference calls to advise APS specialist regarding medical eligibility documents and processes also offered in preparation of the October 1 start date. In the second quarter (October-December 2011) the IPN was offered a Webinar to update participating psychologists and provide information for those psychologists interested in participating. During the months of January to March 2012,



a CDCSP training was offered by PC&A at the Celebrating Connections Conference in Charleston, WV and another ICAP training was provided for participants. Additionally, webinars were offered monthly this quarter to the IPN as updates occurred regarding the newly implemented network. During the last quarter, CDCSP training and ICAP training was offered to participating providers in Morgantown, WV. Additionally, PC&A staff consulted with APS-Healthcare specialist regarding the I/DD Waiver electronic Care Connection implementation and use.

PC&A provided training and technical assistance in an effort to assist our service community in information sharing regarding services available for persons with intellectual disabilities and/or developmental disabilities. These efforts occurred whether PC&A provided the service or not. PC&A maintained contact with agencies and other service providers who provide screening and detection of people in need of services. PC&A worked closely with other agencies to assure awareness of the services provided by PC&A for eligibility determination. These agencies included but were not limited to :Department of Health and Human Resources, Community Behavioral Health Centers, nursing facilities, public schools, private physicians, state hospitals, and psychological service providers.

Other outreach efforts to provide community education about persons with disabilities include but are not limited to: training, Fair Hearing Process, and public presentations.

Consulting

PC&A consults daily with service providers, applicants, members, other contracted vendors, as well as the Bureau for Medical Services and Center for Medicaid Services. During the 2008-2012, contract PC&A consulted on **1663** occasions. PC&A consulted on **142** occasions with attorneys, mostly with the Attorney General's Department of Health and Human Resources Division. PC&A provides medical eligibility expertise for the Bureau during the Fair Hearing process as well as policy review.



West Virginia Department of Health and Human Resources
Bureau for Medical Services
Request for Quotation MED13003

Program	2008-2009	2009-2010	2010-2011	2011-2012	Total
PASRR					
Desk Review	372	391	87	192	1042
Out of State	37	122	99	73	331
Level II Eval	1007	587	1185	429	3208
Request Additional Info	1	63	40	8	112
Consult/TA	213	397	187	172	969
CDCSP					
Initial Certifications	17	15	12	21	65
Denial	21	19	18	15	71
Recertification Approved	37	23	10	15	85
Recertification Denied	4	7	2	1	14
Additional Info Requested	13	2	2	3	20
Additional Info Reviewed	0	3	5	1	9
Consult/TA	7	14	16	6	43
ICF/MR					
Initial Certifications	89	69	66	85	309
Denial	17	9	27	26	79
Recertification Approved	360	429	335	389	1513
Recertification Denied	8	2	4	20	34
Additional Info Requested	52	50	45	54	201
Additional Info Reviewed	26	42	49	47	164
Consult/TA	20	42	35	54	151
ICAP	48	235	145	102	530
Waiver					
Initial Certifications	478	290	353	357	1478
Denial	536	412	404	324	1676
Recertification Approved	4229	4139	3789	4282	16439
Recertification Denied	176	110	100	141	527
Additional Info Requested	978	977	904	359	3218
Additional Info Reviewed	446	929	854	397	2626
Approval after initial denial	40	99	28	61	228
Initial IPE Review				466	466
Consult/TA	51	83	78	240	452
Hearing					
Pre-Hearing Approval	128	20	10	17	175
Completed	41	26	18	26	111
Continued/Remanded/Dismissed	76	47	16	19	158
Withdrawn	14	6	8	14	42
Abandoned	11	8	16	6	41
Hearing Prep	47	104	110	97	358
Consult/TA	12	7	13	16	48
Pre-Hearing Conference	10	3	5	8	26
Training	0	26	28	26	80
Attorney Consultation	45	36	22	39	142
QA/Secondary Review					
Request Waiver SR		1035	133	234	1402
Request ICF SR		24	1	0	25
Completed Waiver SR		1035	133	239	1407
Completed ICF SR		24	1	0	25
PASRR		0	0	0	0



Quality Management Plan

Introduction:

PC&A BMS-LTC Project Quality Management Plan (QMP) is a quality improvement and measurement system designed to assist operations to continually improve overall organizational performance and to establish consistent procedures. Implementation assured that designated work met the Federal/State requirements and expectation for the quality of operations for the programs under the contract agreement with The Bureau for Medical Services. Services reviewed in the plan:

- PASRR Level II
- ICF/MR
- CDCSP
- Title XIX MR/DD Home and Community Based Waiver
- Fair Hearing
- Administrative

Through quality assurance activities PC&A BMS-LTC Project continually strive to provide higher levels of quality services to support these programs.

Design:

The PC&A BMS-LTC Project QMP is a measurement of standards established by State and Federal guidelines and contractual agreements with the Bureau for Medical Services to meet requirements with CMS.

An internal review was conducted monthly.

All files reviewed for eligibility for the month, excluding PASRR referrals, was in the sample. A 10% sample of PASRR referrals was reviewed monthly. Staff training records were reviewed monthly

Each service was reviewed and received a meets (+) or does not meets (0) for each standard/outcome. The totals were averaged for a review score for each service and a total review score for the plan.

Each service was expected to achieve and maintain a threshold of achievement 92% or above and a total review score of 92% or above. (The total review score is determined by calculating the total of all standards/outcomes met divided by the total of all standards/outcomes reviewed). Operational Definitions were developed for use with the review. The Operational Definitions are an explanation of the process used by the



Project for meeting the intent of the standard. Below is an example of an Operational Definition.

Example-Standard: Mandatory Requirements A6-Review of training records available indicates that all staff are receiving HIPPA training.

Example-Operational Definition: Records of training of staff is maintained by the Program Manager in a three ring binder by month. The overall training schedule is also available for review for the Program Director that indicates all identified trainings are scheduled and conducted throughout the calendar year.

All operational procedures were reviewed and approved by the Program Director.

Reviews were conducted by trained staff.

Discovery:

Any service with a score below the minimum threshold or a total review score below the minimum threshold required an approved Quality Improvement Plan be developed and implemented.

Remedy:

Continuous Improvement Plans were developed to maintain quality and provide focus for the project to ensure ongoing quality improvement and outcome attainment. A written procedure was developed detailing the plan required to address any unmet standard score.

Continuous Improvement:

An Audit Review was conducted by designated staff at least quarterly. The Program Director reviewed results with the PC&A BMS-LTC Project staff to evaluate how procedures were working to ensure quality of State and Federally funded programs through BMS. The staff met monthly to monitor progress of performance and make recommendations as appropriate. A Continuous Improvement Plan was developed to address any area of quality deficiency. In order to provide quality service, PC&A consults various individuals (BMS staff, DHHR Agency staff, and other contracted vendors) on an ongoing basis. The Program Director approved any recommendations or changes. The results were reported to BMS quarterly.



Conclusion:

The ultimate goal of the PC&A Quality Management Plan is to develop methods to continually improve the quality of services provided to all members of the service system. PC&A received the following total review scores for each contract year:

July 2008-June 2009: 96.3%

July 2009-June 2010: 95.3%

July 2010-June 2011: 98.25

July 2011-June 2012: 99.75%

PC&A achieved and maintained the expected threshold of achievement of 92% or above, for each contract year, meeting the set goal.



STATE OF WEST VIRGINIA
DEPARTMENT OF HEALTH AND HUMAN RESOURCES

Earl Ray Tomblin
Governor

Bureau for Medical Services
350 Capitol Street, Room 251
Charleston, West Virginia 25301
Telephone: (304) 558-1700 Fax: (304) 558-1776

Patsy A. Hardy, FACHE, MSN, MBA
Cabinet Secretary

PC&A, Inc.
CDCSP
202 Glass Drive
Cross Lanes, WV 25314
Telephone: 304-776-7230 Fax: 304/776/7247
sclendenin@pcasolutions.com

Applicant:

Soc. Sec.

This is your notification that the applicant listed above meets the medical eligibility criteria for ICF/MR Level of Care for the Children with Disabilities Community **June 6, 2012.**

There are two steps (medical and financial) for meeting eligibility criteria for this service.

Please contact your local (county) DHHR office upon receipt of this letter and arrange to meet with an Economic Service Worker for information regarding financial eligibility for CDCSP. Retro Financial Eligibility will be determined from the date of the financial eligibility meeting. The local office will follow the Office of Income Maintenance's policies for Children with Disabilities Community Services Program in determining financial eligibility.

In order to continue receiving a medical card, medical and financial eligibility for the Children with Disabilities Community Services Program must be re-determined annually. **As the parent/guardian responsible for the child's participation in the program, a complete re-application packet must be received ten (10) days prior to the lapse date, which is one year from the effective date.** Failure to submit this information within the time frame may result in denial of Medicaid benefits. All information concerning medical eligibility should be submitted to PC&A, Inc. in accordance with the Eligibility Guide for Children with Disabilities Community Services Program updated September 1, 2008. Financial information should simultaneously be submitted to the child's local DHHR office to re-determine financial eligibility.

Please review the memorandum regarding duplication of services enclosed.

Enclosure

cc: Mary Austin, Community Services Manager
WVDHHR-Lewis County (21)



STATE OF WEST VIRGINIA
DEPARTMENT OF HEALTH AND HUMAN RESOURCES

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sclendenin@pcasolutions.com

School Services Versus Services Provided by Private Practitioners
(per School-based Services Medicaid Operations Manual 3/15/2010)

Parents have the freedom to choose services from Medicaid providers outside the school system. However, West Virginia Medicaid does not cover this duplication of services –that is, pay claims for the same services provided in the school system and outside the school system by private practitioners for the same Medicaid service. The parent/guardian must notify the school district if a provider outside the school system is rendering the services as Medicaid will not reimburse the school system for those services. If parents do not want the county boards of education to seek reimbursement through Medicaid, the parent must notify the RESA or the LEA in writing.

Continuation of therapy services may be provided when school is not in session if the school system treatment plan is written to indicate that the identified private practitioner will be providing the service when school is not in session.



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Cabinet Secretary

PC&A, Inc.
CDCSP
202 Glass Drive
Cross Lanes, WV 25314
Telephone: 304-776-7230 Fax: 304/776/7247
sclendenin@pcasolutions.com

DATE:

TO: Applicant

FROM: Sarah Clendenin, Project Coordinator

RE: **CDCSP Initial Application Eligibility Determination**

Applicant:

DOB:

The CDCSP Initial Application is hereby denied. Based on the information submitted, eligibility is denied for the following reasons:

- Documentation submitted does not support the presence of substantial adaptive deficits in three or more of the six major life areas identified for ICF/MR Eligibility.**

Specifically, the documentation failed to demonstrate substantial limitations in the following major life areas:

- | | |
|---|---|
| <input checked="" type="checkbox"/> Self-Care | <input checked="" type="checkbox"/> Receptive or Expressive Language |
| <input checked="" type="checkbox"/> Learning | <input checked="" type="checkbox"/> Mobility |
| <input checked="" type="checkbox"/> Self-Direction | <input checked="" type="checkbox"/> Capacity for Independent Living |

The reviewer relied upon the following facts: **11-09-11 DD-2A CDCSP, 12-15-11 DD-3 Comprehensive Psychological Evaluation, 01-21-11 DD-4, 01-03-11 – 10-2011 Cost Estimate Worksheet, 06-23-11 SSI Denial**

Request for a Fair Hearing: If you do not agree with the decision, you may ask for a Fair Hearing and/or a Pre-Hearing Conference within 90 days of the action taken. A form to request a Fair Hearing/Pre-hearing Conference is enclosed. If this action is termination of your existing benefit, your services may continue until your hearing is held. Within 90 days, you must complete the attached form and submit to the address on the bottom of the form. You must ask for a Pre-Hearing Conference within 13 days of this notice in order to receive continued benefits. If you wish to consult with legal counsel, the following provide free legal services to eligible persons: **Legal Assistance:** (1) Legal Aid of West Virginia, 922 Quarrier Street, Charleston, WV 25301, 1-800-642-8279 with offices in Beckley, Princeton, Huntington, Wheeling, Parkersburg, Clarksburg, Martinsburg, and Logan; (2) WV Advocates, 1207 Quarrier Street, Charleston, WV 25301, 1-800-950-5250; (3) WV EMS TSN, 1609 Garner St, Suite 102, Fairmont, WV 26554, (304)366-0896; or (4) Mountain State Justice, 1031 Quarrier St, Suite 200, Charleston, WV 25301, 1-800-319-7132

The policy upon which the decision is based: Children with Disabilities Community Service Program Chapter 526.

Enclosure



WEST VIRGINIA DEPARTMENT OF HEALTH AND HUMAN RESOURCES
BUREAU FOR MEDICAL SERVICES (MEDICAID)
REQUEST FOR HEARING

NAME: _____

ADDRESS: _____

RECIPIENT ID#: _____

TELEPHONE NUMBER WHERE YOU CAN BE REACHED:

I, _____ am requesting a fair hearing for the following reason(s):
(Print name, please)

(Please list service that was denied or terminated. Be as specific as possible. Use other side of this form, if necessary for more space.)

You may be contacted by a representative of the Department of health and Human Resources regarding this request.

You may be requested to participate in a pre-hearing conference (most likely by telephone).

Which type of hearing would you prefer (please check one):

- All persons participate by telephone conference.
- In person at local office (Medical Consultant by telephone).
- Hearing at the Bureau for Medical Services office in Charleston. (with reimbursement for travel mileage, if requested.)

Signature: _____ Date: _____

If hearing is by telephone and you have any documents to present, please mail your documents before the hearing to the hearing examiner whose name is on the hearing notice that you will receive.

If you will be represented by an attorney or other individual, please list his/her name and address, telephone number:

Return this request to: Bureau for Medical Services
Appeals Sections
Room 251, 350 Capitol Street
Charleston, West Virginia 25301-3706

A staff member will try to contact you by telephone within approximately five days of receipt of this form.

After telephone contact, you will then be notified in writing of the date and time of the hearing. If we are unsuccessful in contacting you by telephone, you will receive written notice of the hearing date and time within 30 days.



STATE OF WEST VIRGINIA
DEPARTMENT OF HEALTH AND HUMAN RESOURCES

Earl Ray Tomblin
Governor

Bureau for Medical Services
350 Capitol Street, Room 251
Charleston, West Virginia 25301
Telephone: (304) 558-1700 Fax: (304) 558-1776

Patsy A. Hardy, FACHE, MSN, MBA
Cabinet Secretary

PC&A, Inc.
ICF/MR
202 Glass Drive
Cross Lanes, WV 25314
Telephone: 304-776-7230 Fax: 304/776/7247
mgolden@pcasolutions.com

MEMORANDUM

DATE: August 2, 2012
TO: **Paula J. Taylor**, Community Services Manager
WV DHHR Monongalia County (30)
FROM: Mekell L. Golden, Project Manager
RE: **Determination of ICF/MR Eligibility**

REM WV Brookhaven Road ICF/MR Group Home has forwarded medical information to our attention for payment of ICF/MR care. Medical eligibility has been approved for the client identified below:

Client:
Medicaid #:
SS #:
Effective Date: **May 07, 2012**

As the Economic Service Worker responsible for this individual: Please notify Kelly Johnson, BMS, Program Manager Facility Based and Residential Services by means of the ES-NH-3 regarding financial eligibility, and thereafter of the resident's movement in and out of the facility and other changes.

As the provider responsible for this individual, notification of any changes of residence via the Discharge/Transfer Form is required, please fax to 304-776-7247. If further assistance is required, please call (304)776-7230, ext. 305.

cc:
Bette Loudermilk, BMS



STATE OF WEST VIRGINIA
DEPARTMENT OF HEALTH AND HUMAN RESOURCES

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Telephone: 304-776-7230 Fax: 304/776/7247
mgolden@pcasolutions.com

MEMORANDUM

DATE: August 2, 2012
TO: ResCare Clarksburg Agency
FROM: Mekell L. Golden, Project Manager
RE: ICF/MR Determination of Medical Eligibility

Applicant: _____ **Medicaid#:** _____

The documentation submitted to establish medical eligibility has been reviewed. Based on the information submitted, eligibility for an ICF/MR Level of Care is denied for the following reasons:

- Information not current:
- Documentation submitted does not support the presence of substantial delays prior to age 22.
- Documentation submitted supports delays that are primarily related more to mental health challenges rather than mental retardation and/or related condition.
- Based on the results contained in the assessments, documentation does not support the applicant requires the active treatment typically provided in an ICF/MR facility.
- Lacks ICF/MR recommendation by the psychologist.
- Diagnostic section incomplete; lack of clarity regarding degree of mental retardation.
- Ineligible diagnosis documented.
- Lacks physician certification for ICF/MR level of care.
- Documentation submitted does not support the presence of substantial adaptive deficits in three or more of the six major life areas identified for ICF/MR eligibility.

Specifically, the documentation failed to demonstrate substantial limitations in the following major life areas:

- | | |
|---|---|
| <input type="checkbox"/> Self-Care | <input type="checkbox"/> Receptive or Expressive Language |
| <input type="checkbox"/> Learning | <input type="checkbox"/> Mobility |
| <input type="checkbox"/> Self-Direction | <input type="checkbox"/> Capacity for Independent Living |

Other: Documentation submitted for review does not adequately address the developmental period nor applicant's ability to live without an ICF/MR level of care throughout her adulthood. Persons requiring this level of care would likely have been evaluated at some point previously. Documentation to support the presence of substantial adaptive delays prior to 22 will be required for further consideration. The social history reflects that she has had a decrease in her level of functioning since treatment for cancer. She does not appear to require the active treatment typically provided in an ICF/MR institutional level of care.

Request for a Fair Hearing: If you do not agree with the decision, you may ask for a Fair Hearing and/or a Pre-Hearing Conference within 90 days of the action taken. A form to request a Fair Hearing/Pre-hearing Conference is enclosed. If this action is termination of your existing benefit, your services may continue until your hearing is held. Within 90 days, you must complete the attached form and submit to the address on the bottom of the form. You must ask for a Pre-Hearing Conference within 13 days of this notice in order to receive continued benefits. If you wish to consult with legal counsel, the following provide free legal services to eligible persons: **Legal Assistance:** (1) Legal Aid of West Virginia, 922 Quarrier Street, Charleston, WV 25301, 1-800-642-8279 with offices in Beckley, Princeton, Huntington, Wheeling, Parkersburg, Clarksburg, Martinsburg, and Logan; (2) WV Advocates, 1207 Quarrier Street, Charleston, WV 25301, 1-800-950-5250; (3) WV EMS TSN, 1609 Garner St, Suite 102, Fairmont, WV 26554, (304)366-0896; or (4) Mountain State Justice, 1031 Quarrier St, Suite 200, Charleston, WV 25301, 1-800-319-7132

The policy upon which the decision is based: ICF/MR Services, Program Chapter 511.

Enclosure



WEST VIRGINIA DEPARTMENT OF HEALTH AND HUMAN RESOURCES
BUREAU FOR MEDICAL SERVICES (MEDICAID)
REQUEST FOR HEARING

NAME: _____

ADDRESS: _____

RECIPIENT ID#: _____

TELEPHONE NUMBER WHERE YOU CAN BE REACHED:

I, _____ am requesting a fair hearing for the following reason(s):
(Print name, please)

(Please list service that was denied or terminated. Be as specific as possible. Use other side of this form, if necessary for more space.)

You may be contacted by a representative of the Department of health and Human Resources regarding this request.

You may be requested to participate in a pre-hearing conference (most likely by telephone).

Which type of hearing would you prefer (please check one):

- All persons participate by telephone conference.
- In person at local office (Medical Consultant by telephone).
- Hearing at the Bureau for Medical Services office in Charleston. (with reimbursement for travel mileage, if requested.)

Signature: _____ Date: _____

If hearing is by telephone and you have any documents to present, please mail your documents before the hearing to the hearing examiner whose name is on the hearing notice that you will receive.

If you will be represented by an attorney or other individual, please list his/her name and address, telephone number:

Return this request to: Bureau for Medical Services
Appeals Sections
Room 251, 350 Capitol Street
Charleston, West Virginia 25301-3706

A staff member will try to contact you by telephone within approximately five days of receipt of this form.

After telephone contact, you will then be notified in writing of the date and time of the hearing. If we are unsuccessful in contacting you by telephone, you will receive written notice of the hearing date and time within 30 days.

PC&A, Inc.
BMS Facility Based and Residential Care ICF/MR
Confirmation of Eligibility and ICAP Score Acceptance

This notice of initial approval and re-determination must be placed in the member's permanent record for verification of ICF/MR medical eligibility.		
Member Name:		Member Number:
Provider:	Name of ICF/MR Group Home/Number:	
ResCare Eastern Agency	Southside/0003445001	
Anchor Date:	Admission Anniversary Date (AAD):	
01/12/2012	07/08/2013	
Current ICAP Date:	Current DD-2A Date:	
02/20/2012	01/20/2012	
ICAP Service Level Score		
	Score	WV Level
Submitted ICAP Service Level Score	71	4
Accepted Adjusted ICAP Service Level Score	N/A	N/A
Accepted ICAP Service Level Score	71	4
PC&A recommended ICAP Service Level Score	N/A	N/A
ICAP Service Level Score Start Date		
ICAP Service Level Score End Date		
01/12/2012		01/11/2013
<p>Required Documentation for re-determination includes: DD-2A and DD-3 within 12 months of AAD Copy of ICAP Booklet and Computerized Score Summary within 90 days of AAD Copy of ICAP Booklet Computerized Score Summary</p>		
<p>Documentation must be submitted to PC&A within 30 days of the AAD at ICF.MR @pcasolutions.com</p> <p>Failure to submit required documentation by the AAD will result in delayed or no notification of authorization dates to Molina Medicaid Solutions.</p>		



STATE OF WEST VIRGINIA
DEPARTMENT OF HEALTH AND HUMAN RESOURCES

Earl Ray Tomblin
Governor

Bureau for Medical Services
350 Capitol Street, Room 251
Charleston, West Virginia 25301
Telephone: (304) 558-1700 Fax: (304) 558-1776

Patsy A. Hardy, FACHE, MSN, MBA
Cabinet Secretary

PC&A, Inc.
ICF/MR
202 Glass Drive
Cross Lanes, WV 25314
Telephone: 304-776-7230 Fax: 304/776/7247
mgolden@pcasolutions.com

MEMORANDUM

DATE: August 2, 2012
TO: ResCare Huntington Agency
FROM: Mekell L. Golden, Project Manager
RE: ICAP Review

Member:

Medicaid#:

Please submit copies of the following for review:

- Previous ICAP Booklet
- Most recent ICAP Booklet
- Revised and Rescored ICAP Booklet
- Computerized Score Summary
- DD-2A
- DD-3
- DD-4
- DD-5
- IEP
- Behavior Support Plan
- Behavioral Support Plan Data
- Behavior Protocol/Interactive Guidelines

Other: Reviewed 06/05/2012 ICAP. It appears that this individual has suffered significant decompensation for undetermined medical reasons over the past year which will impact her score significantly; however, it does appear that two areas on the maladaptive domain are overrated. The areas of Unusual or Repetitive Habits (shuffling feet and fear of falling) and Inattentive Behavior (can't sit still) are rated "extremely serious/a critical problem." Behaviors that are considered "extremely serious/a critical problem" are considered to be life-threatening, and individualized objective and written records of every occurrence of the behavior is documented, the frequency is difficult to reduce, and the consequences are difficult to minimize. It is understood that she has a 1:1 staff member at this time, but an extremely serious rating appears excessive. It is likely that a change will not impact the score significantly enough to increase it from a Level 2 to a Level 3. Please, review, rescore, and resubmit for further consideration.

Psychological Consultation & Assessment, Inc.
Bureau for Medical Services
Long Term Care Project
PC&A BMS LTC Project

MEMORANDUM

DATE: March 21, 2012

TO:
Golden Living Center-Morgantown

FROM: Kristen Blanks, M.A./Clinical Consultant

RE: PASRR Level II Evaluation-

The information provided for the above named individual has been reviewed. It reflects a diagnosis of dementia. As such, the individual is not in the Level II population. The Level I determination: nursing facility level of care eligible, is binding.

Please forward a copy of the memo and the attached signed page 6 of the PAS to the facility in which the individual is placed. If I may be of further assistance, please contact me at (304)776-7230, ext. 304.

**PC&A BMS LTC Project
Psychological Consultation & Assessment, Inc.
Bureau for Medical Services
Long Term Care Project**

MEMORANDUM

DATE:

TO: Facility

FROM: Kristen Blanks, M.A./Clinical Consultant

RE: PASRR Level II Desk Review-

The information provided for the above named individual has been reviewed. It reflects significant functional deficits requiring a nursing facility level of care. The individual may be placed in a nursing facility in West Virginia. A formal Level II is not required. Please forward a copy of the memo and the attached signed page 6 of the PAS to the facility in which the individual is placed.

Based on information provided for review, this individual was admitted to the hospital due to a change in mental status and "psychotic decompensation." He reportedly has a history of schizoaffective disorder and mild mental retardation. He also has a diagnosis of Parkinson's disease. Based on information provided for review, he has been cooperative with care at the hospital. Suicidal and homicidal ideation is denied. Specialized services (inpatient psychiatric care) do not appear warranted and the decision at Level I (nursing facility services) is binding.

If I may be of further assistance, please contact me at (304)776-7230, ext. 304.

Bureau for Medical Services
Policy Unit

Room 251

350 Capitol Street
Charleston, WV 25301-3707

Date: July 20, 2012

Name: Applicant

Medicaid I/DD Waiver Program

- Your Waiver Application is hereby denied.
 Your Waiver services have been terminated.

Your application was denied/terminated because:

The psychological evaluation submitted for this application did not contain a current measure of intellectual functioning. As the primary diagnosis for applicant is a critical aspect of eligibility determination-intellectual disability vs. serious mental illness-a current measure of intellectual functioning is especially relevant in this case as previous measures suggest a mild degree of intellectual disability and are considered to be outdated for eligibility determination. Based on previous assessments and the fact that therapeutic intervention to date has been to address serious mental illness, applicant does not appear to meet diagnostic eligibility requirements.

- Documentation submitted does not support the presence of substantial adaptive deficits in three or more of the six major life areas identified for Waiver eligibility.

Specifically, the documentation failed to demonstrate substantial limitations in the following major life areas:

- | | |
|--|--|
| <input type="checkbox"/> Self-Care | <input checked="" type="checkbox"/> Receptive or Expressive Language |
| <input checked="" type="checkbox"/> Learning | <input checked="" type="checkbox"/> Mobility |
| <input checked="" type="checkbox"/> Self-Direction | <input checked="" type="checkbox"/> Capacity for Independent Living |

Reviewer(s) relied on the following facts:

05/30/2012 IPE, Undated letter from physician, 04/20/2012 partially completed IPE (signed by MD), 07/26/2011 Comprehensive Biopsychosocial Psychiatric Evaluation, 01/12/2012 Child Fact Sheet for applicant –author unknown, undated Child Status and Service Summary-author unknown, 03/28/2011 Notice of Denial

You have the right to a **second medical exam** at the department's expense if the decision was based on medical reasons. You have the right of access to your file and copies free of charge.

FAIR HEARING: If you do not agree with the decision, you may ask for a **Fair Hearing** and/or a Pre-Hearing Conference within 90 days of the date of this letter. A form to ask for a Fair Hearing and/or a Pre-Hearing Conference is also enclosed. Within 90 days, you must complete this form and submit it to the address on the Hearing Request form. If this action is termination of your benefit, your service may continue until your hearing is held and a final decision is made by the hearing examiner; but you may ask for a Hearing/Pre-Hearing Conference within 13 days of this notice in order to receive continued benefits. The following organizations provide **free legal services** to eligible persons: WV Advocates, 1207 Quarrier Street, Charleston, WV 25301; 1-800-950-5250; Legal Aid of WV, 922 Quarrier Street, 4th Floor, Charleston, WV 25301; 1-800-642-8279; WV EMS TSN, Behavioral Health Services Program, P.O. Box 100, Elkview, WV 25701-0100; (304) 965-0578. The Department will assist in arranging transportation if needed.

The policy upon which the decision is based: I/DD Waiver manual Chapter 513, 513.3.2

Bureau for Medical Services
Policy Unit

Room 251

350 Capitol Street
Charleston, WV 25301-3707

NOTICE OF DENIAL/TERMINATION

STATE OF WEST VIRGINIA

DEPARTMENT OF HEALTH AND
HUMAN RESOURCES

Date: July 30, 2012

Name: Applicant

Medicaid I/DD Waiver Program

- Your Waiver Application is hereby denied.
 Your Waiver services have been terminated.

Your application was denied/terminated because:

In order to meet eligibility criteria for the Title XIX I/DD Waiver program, individuals must have a diagnosis of intellectual disability or a related condition accompanied by substantial adaptive deficits in 3 of 6 major life areas prior to the age of 22. Documents which indicate the degree of any adaptive deficits which resulted from the 19xx head injury have not been submitted for review. Therefore, the presence of delay in 3 of 6 major life areas as defined by I/DD eligibility criteria cannot be ascertained. In fact, no documentation regarding applicant's functional status following his head injury and prior to the age of 22 has been submitted for review.

- Documentation submitted does not support the presence of substantial adaptive deficits in three or more of the six major life areas identified for Waiver eligibility.

Specifically, the documentation failed to demonstrate substantial limitations in the following major life areas:

- | | |
|--|--|
| <input checked="" type="checkbox"/> Self-Care | <input checked="" type="checkbox"/> Receptive or Expressive Language |
| <input checked="" type="checkbox"/> Learning | <input checked="" type="checkbox"/> Mobility |
| <input checked="" type="checkbox"/> Self-Direction | <input checked="" type="checkbox"/> Capacity for Independent Living |

Reviewer(s) relied on the following facts:

05/04/2011 Notice of Denial, 03/26/2012 unsigned letter on physicians letterhead

You have the right to a **second medical exam** at the department's expense if the decision was based on medical reasons. You have the right of access to your file and copies free of charge.

FAIR HEARING: If you do not agree with the decision, you may ask for a **Fair Hearing** and/or a Pre-Hearing Conference within 90 days of the date of this letter. A form to ask for a Fair Hearing and/or a Pre-Hearing Conference is also enclosed. Within 90 days, you must complete this form and submit it to the address on the Hearing Request form. If this action is termination of your benefit, your service may continue until your hearing is held and a final decision is made by the hearing examiner; but you may ask for a Hearing/Pre-Hearing Conference within 13 days of this notice in order to receive continued benefits. The following organizations provide **free legal services** to eligible persons: WV Advocates, 1207 Quarrier Street, Charleston, WV 25301; 1-800-950-5250; Legal Aid of WV, 922 Quarrier Street, 4th Floor, Charleston, WV 25301; 1-800-642-8279; WV EMS TSN, Behavioral Health Services Program, P.O. Box 100, Elkview, WV 25701-0100; (304) 965-0578. The Department will assist in arranging transportation if needed.

The policy upon which the decision is based: I/DD Waiver manual Chapter 513, 513.3.2



Attachment B: Mandatory Specification Checklist

Vendor Administrative Operation Requirements

2.4.1:

PC&A will comply with all requirements listed in Attachment B.

2.4.2:

PC&A staff have provided contractual services to the Bureau for Medical Services for twenty-eight years. PC&A staff has knowledge of the State, Federal, and local Medicaid rules and regulations pertaining to ICF/MR facilities, I/DD Waiver services, CDCSP, and Nursing facilities Level I and Level II evaluations.

2.4.3:

PC&A's current BMS-LTC Policy and Procedure Manual will be revised as needed for the eligibility and/or evaluation processes for the I/DD Waiver program, CDCSP program, ICF/MR facilities and PASRR Level II evaluations within thirty (30) calendar days of the awarded contract. It is understood that the manual and any updates to the manual will be approved by BMS fourteen (14) calendar days prior to the implementation of each eligibility and/or evaluation process established.

2.4.4:

PC&A's Quality Management Manual will be revised within thirty (30) calendar days of the awarded contract. The quality management plan will include both quality assurance standards and quality improvement activities for all the program requirements. The results of the QA reviews will be reported to BMS at monthly face-to-face or conference call contract management team meetings. It is further understood that the manual and any updates to the manual must be approved by BMS fourteen (14) calendar days prior to quality management implementation.

2.4.5:

PC&A will provide quarterly reports and/or ad hoc data collection, data analysis and data reporting to BMS within 14 calendar days from the end of the quarter and within 14 days when a request for ad hoc data collection, data analysis and data reporting has been requested. Ad hoc reports will be bid as an all-inclusive hourly rate and it is understood that it will require BMS approval of a Statement of Work (SOW) and submission of the related cost estimate for that work. It is understood that the following quarterly data will be reported:



*Total Evaluation Data: including total number of initial approvals, total number of initial denials, total number of redetermination approvals, total number of redetermination denials.

*CDCSP: data will be collected, maintained and available regarding the total number of initial approvals, denials, and annual redetermination approvals, annual redetermination denials, and the number of attorney consults.

*ICF/MR: data will be collected, maintained, and available regarding the total number of initial approvals, prior approvals, initial denials, annual redetermination of approvals, annual redetermination of denials, and number of attorney consults.

*PASRR: data will be collected, maintained, and available for the total number of desk reviews completed, the number of out-of-state desk reviews completed, the number of trainings provided for Level II evaluators, and the number of trainings for providers.

*I/DD Waiver: data will be collected, maintained, and available for the total number of initial approvals, number of denials, the number of re-determination approvals and re-determination denials, and the number of attorney consults.

*Fair Hearings: data will be collected, maintained, and available regarding the total number prehearing approvals, the number of hearings completed, the number of hearings in which the applicant withdraws their request, and the total number of hearings that were abandoned or dismissed.

*Quality: PC&A will have a structured monitoring process utilizing the data and quality information to assure that actions are in place for continuous review and improvement.

2.4.6:

PC&A will participate in a minimum of one (1) monthly contractual management team meeting either face-to-face or by conference call with the Bureau for Medical Services.

2.4.7

PC&A will be responsible for providing all operational and administrative support services necessary for the operation of the medical eligibility determinations for the I/DD Waiver Program, CDCSP Program, ICF/MR facilities, and the PASRR Level II evaluations.

2.4.8

PC&A will provide staff to participate/represent the BMS in fair hearings for PASRR Level II assessments, I/DD Waiver medical eligibility determinations, ICF/MR medical eligibility determinations, and CDCSP medical eligibility determinations.



2.4.9

PC&A will have staff available five days per week Monday through Friday, (excluding West Virginia observed holidays) via telephone or e-mail during normal business hours from 9 AM through 5 PM) Eastern Standard Time. PC&A staff will be available for any emergencies and an emergency contact number will be provided to BMS to be available on an emergent basis and to address any emergencies as requested by the Bureau.

2.4.10

PC&A is located at: 202 Glass Dr., Cross Lanes, West Virginia, 25313. One project manager has been identified and will continue in that role. A computer system compatible with the West Virginia Office of Technology supporting versions of Microsoft Operating System, Microsoft Office Suite, Internet Explorer, and current technologies for data interchange, appropriate administrative and clerical/data support, and storage capacity for maintaining current and archived member eligibility/medical records as required by law and/or regulation in either paper or electronic format is currently available and will remain available within 30 days of the contract award.

2.4.11

PC&A will provide, at a minimum, one (1) up to a maximum of four (4) face-to-face statewide trainings for each of the following programs annually: PASRR Level II, CDCSP, ICF/MR facilities, I/DDD Waiver and/or ICAP. It is understood that all trainings and training materials must be approved by BMS fourteen (14) days in advance of any training event.

ICF/MR PROGRAM ELIGIBILITY:

2.4.12

PC&A shall provide at a minimum, one (1) West Virginia licensed psychologist for determining eligibility for ICF/MR levels of care.

2.4.13

PC&A staff will determine ICF/MR eligibility, both initially and for annual redeterminations, within 30 calendar days of receipt of the completed packet from the provider. Annual redeterminations will be completed within 30 calendar days of the anniversary date of the initial eligibility upon receipt from the provider. Additionally, PC&A will review ICAP response booklets to determine the accuracy of the level scores provided that will result in a reimbursement rate, both initially and annually thereafter.

2.4.14

PC&A will provide the BMS claims fiscal agent with necessary information required to generate authorizations for services which include: the ICAP service level scores, corresponding initial effective date, and termination dates for ICF/MR facility participants. PC&A and the claims fiscal agent will create an interface that will allow PC&A to input information regarding authorizations.



2.4.15

PC&A will utilize required evaluations such as medical, psychiatric, psychological, etc. submitted by the applicant and/or provider to determine each participants need for an ICF/MR level of care.

2.4.16

PC&A will complete an on-site review of ICAP Assessments per each facility on an annual basis for quality monitoring of the process and for determining an accurate ICAP Level score. PC&A will visit 100% of all ICF/MR facilities in the first year of the contract and then will review 33% of the facilities for each contract year following the initial year.

2.4.17

PC&A will notify in writing, the individual/member or legal representative and local County DHHR office of any denial and appeal rights regarding the eligibility decision.

PASRR Program Eligibility Level II

2.4.18

PC&A will provide at a minimum one West Virginia licensed psychologist for determining eligibility for nursing facility services, PASRR Level II program.

2.4.19

PC&A will conduct an independent desk review or face-to-face visit for PASRR Level II evaluations to determine medical eligibility for individuals who may need nursing facility level care and trigger a Level II evaluation.

2.4.20

PC&A will notify the referring entity of the results of the PASRR Level II evaluation in writing via completing Page 6 of 6 on the PAS and written report within nine (9) calendar days of receipt of the referral.

2.4.21

PC&A will be responsible for ensuring that the Level II evaluators complete all PASRR Level II evaluations within nine (9) calendar days of receipt of referral including a completed written report.

2.4.22

PC&A will provide face-to-face or web-based PASRR training and certification, for West Virginia licensed psychologists at a minimum once annually.

2.4.23

PC&A will recruit, train, and identify West Virginia licensed psychologists throughout the state to conduct PASRR Level II evaluations and shall be responsible for



monitoring each evaluator through review of their submitted reports and required documentation

2.4.24

PC&A will be responsible for all clerical and/or administrative functions associated with the determination of eligibility for PASRR Level II evaluations. Such functions shall include: written notification of eligibility, tracking of applicants, requests for information regarding eligibility, tracking of eligibility decisions, tracking of certified/train/approved evaluators, and participating and tracking of Medicaid fair hearing status.

I/DD WAIVER ELIGIBILITY

2.4.25

PC&A shall provide at least one West Virginia licensed psychologist for determining eligibility for I/DD Waiver.

2.4.26

PC&A will make an initial assessment and medical eligibility determination within ninety (90) calendar days of the completed initial application request and will notify BMS and/or its contracted ASO in writing of all determinations.

2.4.27

PC&A will complete annual medical eligibility redeterminations of I/DD Waiver members prior to each members annual anchor date and PC&A will notify BMS and the I/DD Waiver Administrative Service Organization in writing of all determinations. PC&A understands that the member's anchor date is the annual date that each member's medical eligibility is due to be re-determined as well as the date for that members annual Individual Program Plan (IPP).

2.4.28

PC&A will be responsible for the development and coordination of the Independent Psychologist Network (IPN) that is comprised of West Virginia licensed psychologists, to ensure completion of the Independent Psychological Evaluation (IPE) assessments to determine initial medical eligibility for the I/DD Waiver program and second medical evaluations requested by BMS.

2.4.29

PC&A will recruit, approve and train West Virginia licensed psychologists throughout the state to conduct I/DD Waiver evaluations, including monitoring the accuracy of their reports and providing necessary re-education.

2.4 .30

PC&A will provide quarterly clinical reviews of evaluation reports in cooperation with the BMS I/DD Waiver ASO as needed. It is understood that the type, scope, and frequency shall be outlined in the quality indicators as developed by BMS and approved by CMS in the I/DD Waiver application.



2.4.31

PC&A will coordinate with the BMS I/DD Waiver ASO to ensure accurate reporting of quarterly data pertaining to evaluations completed, timelines, eligibility decisions and hearings as identified in section 2.3.5.

2.4 .32

PC&A will be responsible for assisting and coordinating the scheduling of the psychological assessments with the IPN to assure the initial request for evaluation is completed within ninety (90) calendar days.

2.4.33

PC&A will be responsible for reimbursing IPN Psychologists directly for completion of the Independent Psychological Evaluation at the prevailing Medicaid rate for non-Medicaid eligible applicants at the time of assessment. It is understood that the cost incurred by PC&A for reimbursing IPN psychologists directly for the completion of the Independent Psychological Evaluation for non-Medicaid eligible applicants will be considered a pass-through cost and will be separately invoiced to the Bureau for Medical Services and will not be required to be included in the cost proposal for this RFQ.

2.4.34

PC&A will be responsible for communicating to the ASO that the IPE is complete and approved for processing for payment.

2.4.35

PC&A will track and report receipt of all initial eligibility applications and to whom the IPE was assigned, the IPE completions, and payments to all members of the IPN that shall include the number of completed evaluations by the IPN and payments to the IPN.

2.4.36

PC&A shall ensure that the IPN has the necessary statewide coverage to complete evaluations in the required timeframes in 2.3.32.

CDCSP ELIGIBILITY

2.4.37

PC&A will be responsible for the assessment review and determination of required medical eligibility for the CDCSP.

2.4 .38

PC&A will provide a West Virginia Registered Nurse for determining the medical eligibility for levels of care for the CDCSP.



2.4.39

PC&A will determine medical eligibility for the CDCSP within thirty (30) calendar days of receipt of a complete application.

2.4.40

PC&A will re-determine medical eligibility annually for the CDCSP members within thirty (30) calendar days of the individual's anchor date of medical eligibility.

2.4.41

PC&A will utilize the required evaluations such as the medical, psychiatric, psychological, etc. submitted by the applicant in order to determine the level of care for the CDCSP.

2.4 .42

PC&A will notify in writing the individual/member or legal representative, the DHHR county office and the Bureau for Medical Services regarding the eligibility decision and appeal rights for the CDCSP within thirty (30) calendar days of receipt of the completed application.

2.4.43

PC&A will be responsible for all clerical and/or administrative functions associated with the determination of eligibility for the CDCSP. Such functions shall include written notification of eligibility, tracking of applicants, requests for information regarding eligibility, tracking of eligibility decisions, tracking of certified/trained/approved evaluators, and tracking of Medicaid fair hearing status.

ADDITIONAL SERVICES

2.4.44

PC&A will provide additional services to comply with externally driven changes to BMS programs and requirements, including any State or Federal laws, rules, and regulations. Additional services will be bid as an all inclusive hourly rate and shall require Bureau approval of a Statement of Work (SOW) and submission of a related cost estimate.



I certify that the quotation submitted meets or exceeds all mandatory specifications of this Request for Quotation. Additionally, I agree to provide any additional documentation deemed necessary by the State of West Virginia to demonstrate compliance with said mandatory specifications.

Psychological Consultation & Assessment Inc.

Company

Richard L. Workman, President

Representative Name, Title

304-776-7230

Contact Phone/Fax Number

August 2, 2012

Date



Attachment C: Cost Sheet

Cost information below as detailed in the Request for Quotation. Cost should be clearly marked.

Cost must be broken out by the following categories. This will be a fixed cost contract, based on a per year basis. Vendor shall not alter cost sheet.			
	Year 1	Year 2 (Optional Renewal)	Year 3 (Optional Renewal)
Start-up Costs	\$ 0.00		
Program: 2.4.1-2.4.11 Vendor Administrative Operation Requirements	\$ 402,079.39	\$ 426,447.84	\$ 447,770.23
Program: 2.4.12-2.4.17 ICF/MR Program Eligibility	\$ 113,275.29	\$ 116,673.54	\$ 120,173.75
Program: 2.4.18-2.4.24 PASRR Program Eligibility	\$ 56,147.61	\$ 57,832.04	\$ 59,567.00
Program: 2.4.25 and 2.4.28-2.4.36 I/DD Waiver Eligibility	\$ 43,877.50	\$ 45,193.83	\$ 46,549.64
Program: 2.4.26 - I/DD Initial Eligibility Determinations	\$ 101,323.72	\$ 104,363.43	\$ 107,494.33
Program: 2.4.27: I/DD Re-determinations	\$ 25,606.81	\$ 26,375.01	\$ 27,166.26
Program: 2.4.37-2.4.43 CDCSP Eligibility	\$ 31,880.28	\$ 32,836.63	\$ 33,821.73
*Additional Services \$130.00 (all inclusive hourly rate) x 100 hours (estimated)	13,000.00		



West Virginia Department of Health and Human Resources

Bureau for Medical Services

Request for Quotation MED13003

*Additional Services \$ 135.00 (all inclusive hourly rate) x 100 hours (estimated)		13,500.00	
*Additional Services \$140.00 (all inclusive hourly rate) x 100 hours (estimated)			14,000.00
*Ad hoc Reporting \$73.79(all inclusive hourly rate) x 20 hours (estimated)	\$ 1475.80		
*Ad hoc Reporting \$82.67(all inclusive hourly rate) x 20 hours (estimated)		\$ 1653.44	
*Ad hoc Reporting \$92.64(all inclusive hourly rate) x 20 hours (estimated)			\$ 1852.74
Total Annual Costs	\$ 788,666.40 (A)	\$ 824,875.76 (B)	\$ 858,395.68 (C)
Total Not to Exceed Cost (A+B+C)			\$ 2,471,937.84

***All-inclusive Hourly Rate for Additional Services and Ad hoc Reporting:**

The Bureau and Vendor will jointly determine a 'not-to-exceed' number of hours, time frame, and staff for each Additional Service and/or Ad hoc report. The Vendor must agree to provide a Statement of Work and estimation of effort and receive Bureau approval of the actual 'not-to-exceed' hours, time frame, and staff prior to work beginning.

Notes:

- 1.) The Vendors Total Not to Exceed Cost will include all general and administrative staffing (secretarial, clerical, etc.), travel, supplies and other resource costs necessary to perform all services within the scope of this procurement.
- 2.) Estimated hours are to be used for cost bid evaluation purposes only.



- 3.) The cost bid will be evaluated on the Total Not to Exceed Cost of Contract for the three (3) year period.
- 4.) Vendor will not be eligible to invoice any operational or programmatic costs while invoicing for start-up costs. Programmatic costs identified in the cost bid sheet beginning with the label of Program: shall be pro-rated based on the remaining months in the contract period once the start-up period is concluded.
- 5.) Program services shall be invoiced based on a pro-rata share of the monthly periods included in the contract period, excluding all start up periods in which start-up costs are invoiced.

Psychological Consultation & Assessment, Inc.

(Company)

Richard L. Workman

Richard L. Workman, President

(Representative Name, Title)

304-776-7230

(Contact Phone/Fax Number)

August 2, 2012

(Date)

If applicable, sign and submit the attached Resident Vendor Preference Certificate with the quotation.



BUREAU FOR MEDICAL SERVICES

MED PURCHASING AFFIDAVIT

West Virginia Code §5A-3-10a states: No contract or renewal of any contract may be awarded by the state or any of its political subdivisions to any vendor or prospective vendor when the vendor or prospective vendor or a related party to the vendor or prospective vendor is a debtor and the debt owned is an amount greater than one thousand dollars in the aggregate

DEFINITIONS:

"Debt" means any assessment, premium, penalty, fine, tax or other amount of money owed to the state or any of its political subdivisions because of a judgment, fine, permit violation, license assessment, defaulted workers' compensation premium, penalty or other assessment presently delinquent or due and required to be paid to the state or any of its political subdivisions, including any interest or additional penalties accrued thereon.

"Debtor" means any individual, corporation, partnership, association, Limited Liability Company or any other form or business association owing a debt to the state or any of its political subdivisions. "Political subdivision" means any county commission; municipality; county board of education; any instrumentality established by a county or municipality; any separate corporation or instrumentality established by one or more counties or municipalities, as permitted by law; or any public body charged by law with the performance of a government function or whose jurisdiction is coextensive with one or more counties or municipalities. "Related party" means a party, whether an individual, corporation, partnership, association, limited liability company or any other form or business association or other entity whatsoever, related to any vendor by blood, marriage, ownership or contract through which the party has a relationship of ownership or other interest with the vendor so that the party will actually or by effect receive or control a portion of the benefit, profit or other consideration from performance of a vendor contract with the party receiving an amount that meets or exceeds five percent of the total contract amount.

EXCEPTION: The prohibition of this section does not apply where a vendor has contested any tax administered pursuant to chapter eleven of this code, workers' compensation premium, permit fee or environmental fee or assessment and the matter has not become final or where the vendor has entered into a payment plan or agreement and the vendor is not in default of any of the provisions of such plan or agreement.

Under penalty of law for false swearing (*West Virginia Code §61-5-3*), it is hereby certified that the vendor affirms and acknowledges the information in this affidavit and is in compliance with the requirements as stated.

WITNESS THE FOLLOWING SIGNATURE

Vendor's Name: Psychological Consultation + Assessment, Inc.

Authorized Signature: Richard R. Wickham Date: 8/2/12

State of WV

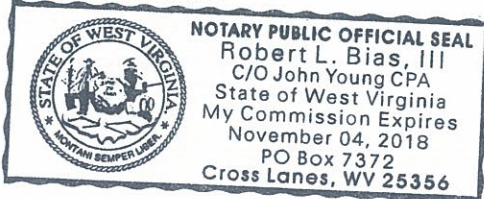
County of Kanawha, to-wit:

Taken, subscribed, and sworn to before me this day of 2 Aug, 2012

My Commission expires 11/4/2018, 20 .

AFFIX SEAL HERE

NOTARY PUBLIC



Purchasing Affidavit (Revised 12/15/09)



Bureau for Medical Services

VENDOR PREFERENCE CERTIFICATE

Certification and application* is hereby made for Preference in accordance with *West Virginia Code*, §5A-3-37. (Does not apply to construction contracts). *West Virginia Code*, §5A-3-37, provides an opportunity for qualifying vendors to request (at the time of bid) preference for their residency status. Such preference is an evaluation method only and will be applied only to the cost bid in accordance with the *West Virginia Code*. This certificate for application is to be used to request such preference. The Purchasing Division will make the determination of the Resident Vendor Preference, if applicable.

1. **Application is made for 2.5% resident vendor preference for the reason checked:**

Bidder is an individual resident vendor and has resided continuously in West Virginia for four (4) years immediately preceding the date of this certification; or,

Bidder is a partnership, association or corporation resident vendor and has maintained its headquarters or principal place of business continuously in West Virginia for four (4) years immediately preceding the date of this certification; or 80% of the ownership interest of Bidder is held by another individual, partnership, association or corporation resident vendor who has maintained its headquarters or principal place of business continuously in West Virginia for four (4) years immediately preceding the date of this certification; or,

Bidder is a nonresident vendor which has an affiliate or subsidiary which employs a minimum of one hundred state residents and which has maintained its headquarters or principal place of business within West Virginia continuously for the four (4) years immediately preceding the date of this certification; or,

2. **Application is made for 2.5% resident vendor preference for the reason checked:**

Bidder is a resident vendor who certifies that, during the life of the contract, on average at least 75% of the employees working on the project being bid are residents of West Virginia who have resided in the state continuously for the two years immediately preceding submission of this bid; or,

3. **Application is made for 2.5% resident vendor preference for the reason checked:**

Bidder is a nonresident vendor employing a minimum of one hundred state residents or is a nonresident vendor with an affiliate or subsidiary which maintains its headquarters or principal place of business within West Virginia employing a minimum of one hundred state residents who certifies that, during the life of the contract, on average at least 75% of the employees or Bidder's affiliate's or subsidiary's employees are residents of West Virginia who have resided in the state continuously for the two years immediately preceding submission of this bid; or,

4. **Application is made for 5% resident vendor preference for the reason checked:**

Bidder meets either the requirement of both subdivisions (1) and (2) or subdivision (1) and (3) as stated above; or,

5. **Application is made for 3.5% resident vendor preference who is a veteran for the reason checked:**

Bidder is an individual resident vendor who is a veteran of the United States armed forces, the reserves or the National Guard and has resided in West Virginia continuously for the four years immediately preceding the date on which the bid is submitted; or,

6. **Application is made for 3.5% resident vendor preference who is a veteran for the reason checked:**

Bidder is a resident vendor who is a veteran of the United States armed forces, the reserves or the National Guard, if, for purposes of producing or distributing the commodities or completing the project which is the subject of the vendor's bid and continuously over the entire term of the project, on average at least seventy-five percent of the vendor's employees are residents of West Virginia who have resided in the state continuously for the two immediately preceding years.

Bidder understands if the Secretary of Revenue determines that a Bidder receiving preference has failed to continue to meet the requirements for such preference, the Secretary may order the Director of Purchasing to: (a) reject the bid; or (b) assess a penalty against such Bidder in an amount not to exceed 5% of the bid amount and that such penalty will be paid to the contracting agency or deducted from any unpaid balance on the contract or purchase order.

By submission of this certificate, Bidder agrees to disclose any reasonably requested information to the Purchasing Division and authorizes the Department of Revenue to disclose to the Director of Purchasing appropriate information verifying that Bidder has paid the required business taxes, provided that such information does not contain the amounts of taxes paid nor any other information deemed by the Tax Commissioner to be confidential.

Under penalty of law for false swearing (*West Virginia Code*, §61 -5-3), Bidder hereby certifies that this certificate is true and accurate in all respects; and that if a contract is issued to Bidder and if anything contained within this certificate changes during the term of the contract, Bidder will notify the Purchasing Division in writing immediately.

Bidder: Psychological Consultation & Assessment, Inc

Signed: 

Date: August 2, 2012

Title: President

**Check any combination of preference consideration(s) indicated above, which you are entitled to receive*



STATE OF WEST VIRGINIA
 DEPARTMENT OF ADMINISTRATION
 PURCHASING DIVISION
 2019 WASHINGTON STREET, EAST
 POST OFFICE BOX 50130
 CHARLESTON, WEST VIRGINIA 25305-0130
 05/18/2012

RICHARD L WORKMAN
 PSYCHOLOGICAL CONSULTATION & A
 202 GLASS DR

CROSS LANES WV 25313

THIS IS TO CONFIRM RECEIPT OF YOUR VENDOR REGISTRATION FEE. PAYMENT OF THE FEE ENABLES YOU TO PARTICIPATE IN THE PURCHASING DIVISION'S COMPETITIVE BID PROCESS AND ENTITLES YOU TO A ONE-YEAR SUBSCRIPTION TO THE WEST VIRGINIA PURCHASING BULLETIN. A NEW ISSUE OF THE WEST VIRGINIA PURCHASING BULLETIN IS POSTED ON OUR WEB SITE EACH WEEK. BID OPPORTUNITIES ESTIMATED AT \$25,000 OR MORE ARE ADVERTISED IN THIS PUBLICATION. WE ENCOURAGE YOU TO LOG ON AND VIEW THE BULLETIN EVERY FRIDAY SO AS NOT TO MISS IMPORTANT BIDDING OPPORTUNITIES. OUR WEB ADDRESS IS:

[HTTP://WWW.STATE.WV.US/ADMIN/PURCHASE](http://www.state.wv.us/admin/purchase)

IN ORDER TO ACCESS THE WEST VIRGINIA PURCHASING BULLETIN, YOU WILL NEED YOUR VENDOR NUMBER, GROUP NUMBER (IF ANY), AND YOUR PASSWORD WHICH ARE PRINTED BELOW. YOUR ACCESS WILL BECOME EFFECTIVE ON THE FIRST MONDAY AFTER 05/18/2012, STATE HOLIDAYS EXCLUDED.

HELPFUL TIPS: YOUR COMPUTER-GENERATED VENDOR NUMBER BEGINS WITH AN ASTERISK, BUT DO NOT USE THE ASTERISK WHEN LOGGING IN. ALSO, OUR LOGIN SCRIPT IS CASE SENSITIVE. THEREFORE, IF YOUR VENDOR NUMBER CONTAINS A CHARACTER LIKE A, B, OR C, PLEASE TYPE IT IN UPPER CASE.

IF YOU HAVE QUESTIONS, FEEL FREE TO CONTACT US AT 304-558-2311 OR JEANNE.B.BARNHART@WV.GOV. THANK YOU.

SINCERELY YOURS,

Jeanne Barnhart

VENDOR REGISTRATION

VENDOR NUMBER : *709062630
 GROUP NUMBER :
 PASSWORD : 12944



Attachment D: Special Terms and Conditions

If a Vendor's quotation includes proprietary language and/or personally identifiable information (PII) Vendor employees or subcontractors within the technical quotation, an electronic copy omitting any proprietary language and/or PII, shall be submitted for publishing to the DHHR and BMS web-sites.

Vendor agrees that BMS retains ownership of all data, procedures, programs, work papers, and all materials developed and/or gathered under the contract with BMS.

I certify that I have read and acknowledge the additional contract provisions contained in Attachment D and that the quotation meets or exceeds all additional requirements as listed.

Psychological Consultation & Assessment, Inc.

(Company)

Richard L. Workman, President

(Representative Name, Title)

304-776-7230

(Contact Phone/Fax Number)

August 2, 2012

(Date)

From:

08/01/2012 11:46

#730 P.001/002



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
7/26/2012

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Payne and Garlow Insurance Inc. 3744 Teays Valley Road Suite 101 Hurricane WV 25526	CONTACT NAME: Jackie Riddle
	PHONE (A/C No. Ext): (304) 757-6880
	FAX (A/C No.): (304) 757-6894
	E-MAIL ADDRESS: Jackie@payneandgarlow.com
	INSURER(S) AFFORDING COVERAGE
	INSURER A: Maryland Casualty Co
	INSURER B:
	INSURER C:
	INSURER D:
	INSURER E:
	INSURER F:
INSURED PSYCHOLOGICAL CONSULTATION AND ASSESSMENT, 202 GLASS DRIVE CROSS LANES WV 25313-1319	NAIC # 19356

COVERAGES **CERTIFICATE NUMBER:** CL1272601707 **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	GENERAL LIABILITY <input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR			PAS039205290	11/30/2011	11/30/2012	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COM/OP AGG \$ 2,000,000
	GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC						
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> NON-OWNED AUTOS						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
	UMBRELLA LIAB EXCESS LIAB						EACH OCCURRENCE \$ AGGREGATE \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below			N/A			WC STATU-TORY LIMITS OTH-ER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)

CERTIFICATE HOLDER WV Bureau for Medical Services 350 Capitol St Room 251 Charleston, WV 25301	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE Harold Payne/JR <i>Harold Payne</i>

ADDITIONAL COVERAGES

Ref #	Description HIREA	Coverage Code HIREA	Form No.	Edition Date
Limit 1 1,000,000	Limit 2	Limit 3	Deductible Amount	Deductible Type
			Premium \$116.00	
Ref #	Description Ex Fungus	Coverage Code XSPCP	Form No.	Edition Date
Limit 1	Limit 2	Limit 3	Deductible Amount	Deductible Type
			Premium	
Ref #	Description EPLIE	Coverage Code EPLIE	Form No.	Edition Date
Limit 1 50,000	Limit 2	Limit 3	Deductible Amount	Deductible Type
			Premium	
Ref #	Description Y2K Liab Excl	Coverage Code XY2KL	Form No.	Edition Date
Limit 1	Limit 2	Limit 3	Deductible Amount	Deductible Type
			Premium	
Ref #	Description Absolute Abestos Excl	Coverage Code XABAS	Form No.	Edition Date
Limit 1	Limit 2	Limit 3	Deductible Amount	Deductible Type
			Premium	
Ref #	Description EPLIO	Coverage Code EPLIO	Form No.	Edition Date
Limit 1 2,500	Limit 2	Limit 3	Deductible Amount	Deductible Type
			Premium	
Ref #	Description DAVSX	Coverage Code DAVSX	Form No.	Edition Date
Limit 1	Limit 2	Limit 3	Deductible Amount	Deductible Type
			Premium	
Ref #	Description AI Certificant Recip	Coverage Code AICER	Form No.	Edition Date
Limit 1	Limit 2	Limit 3	Deductible Amount	Deductible Type
			Premium	
Ref #	Description NOWNA	Coverage Code NOWNA	Form No.	Edition Date
Limit 1 1,000,000	Limit 2	Limit 3	Deductible Amount	Deductible Type
			Premium \$74.00	
Ref #	Description EPLIA	Coverage Code EPLIA	Form No.	Edition Date
Limit 1 50,000	Limit 2	Limit 3	Deductible Amount	Deductible Type
			Premium	
Ref #	Description	Coverage Code	Form No.	Edition Date
Limit 1	Limit 2	Limit 3	Deductible Amount	Deductible Type
			Premium	

7/06/12 - A

DARWIN NATIONAL ASSURANCE COMPANY
Psychologists' Professional Liability Policy
THIS IS A CLAIMS MADE POLICY - PLEASE READ CAREFULLY

*** RENEWAL ***

NOTICE: A LOWER LIMIT OF LIABILITY APPLIES TO JUDGMENTS OR SETTLEMENTS WHEN THERE ARE ALLEGATIONS OF SEXUAL MISCONDUCT (SEE THE SPECIAL PROVISION "SEXUAL MISCONDUCT" IN THE POLICY).

DECLARATIONS

POLICY NO: 5011-7995

ITEM 1. (a) NAME AND ADDRESS OF INSURED:

PSYCHOLOGICAL CONSULTATION &
ASSESSMENT, INC.
202 GLASS DR
CROSS LANES, WV 25313

ACCOUNT NO:

WV-PSYC202-0

0397477C

ITEM 1. (b) ADDITIONAL NAMED INSURED:

RICHARD L. WORKMAN, M.A.
LINDA O. WORKMAN, M.A.
KRISTEN BLANKS, M.A.
SHELLY NICHOLS, M.A.
KERRI LINTON, M.A.

TYPE OF ORG:

CORPORATION

ITEM 2. ADDITIONAL INSURED:

ITEM 3. POLICY PERIOD:

FROM: 07/01/12 TO: 07/01/13
12:01A.M. STANDARD TIME AT THE ADDRESS OF THE INSURED AS STATED HEREIN:

ITEM 4. LIMITS OF LIABILITY:

- (a) \$ 1,000,000 EACH WRONGFUL ACT OR SERIES OF CONTINUOUS, REPEATED OR INTERRELATED WRONGFUL ACTS OR OCCURRENCE
- (b) \$ 5,000 COSTS RELATED TO ANY SINGLE PROCEEDING
- (c) \$ 3,000,000 AGGREGATE, FOR ALL CLAIMS AND ALL PROCEEDINGS

ITEM 5. PREMIUM SCHEDULE:

CLASSIFICATION	NUMBER	RATE	ANNUAL PREMIUM
PSYCHOLOGISTS	4	342.00	1,368.00
OTHER PROFESSIONALS	1	228.00	228.00
DEFENSE LIMIT			.00
CHARGE FOR CORPORATION	1	456.00	456.00
WEST VIRGINIA SURCHARGE	1		10.16
TOTAL PREMIUM:			1,857.16

ITEM 6. RETROACTIVE DATE: 07/01/02


ITEM 7. EXTENDED REPORTING PERIOD

ADDITIONAL PREMIUM (if exercised): \$ 3,250.00 SCHEDULED RATING CREDIT INCLUDED

ITEM 8. POLICY FORMS AND ENDORSEMENTS ATTACHED TO THIS POLICY

PRGE2000 (3/2006) PRGe1110 (1/2006)

THIS IS NOT A BILL. PREMIUM HAS BEEN PAID.
PRGE2005 (3/2006)


AUTHORIZED COMPANY REPRESENTATIVE
American Professional Agency * 95 Broadway, Amityville, NY 11701