



# Harvey-Marion County CDDO

*Supporting increased independence, integration, inclusion, and productivity in individual homes and communities.*

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## Harvey-Marion County CDDO: Functional Assessment Protocol

<b>Amended:</b>	09/22/14; 04/03/18; 10/14/25	<b>Approved:</b>	12/15/2025
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- 1) **Assessors Provide No Direct Services.** Harvey-Marion County CDDO utilizes a Functional Assessment assessor who is employed by Harvey-Marion County CDDO, or an entity that has entered into an agreement with Harvey-Marion County CDDO to perform Functional Assessments, and does not provide any direct services, including case management, to a person served.
- 2) **Assessor Training Requirements.** To ensure accuracy and consistency in the Functional Assessment process, Harvey-Marion County CDDO requires the following of all Functional Assessment screeners:
  - a. All new screeners must pass the required KDADS online training and test within 30 days of employment and at least annually.
  - b. Current screeners will take part in and complete any re-training process provided by KDADS in cooperation with CDDOs with curriculums, training protocol, and continuous quality improvement procedures to be developed.
- 3) **Assessor Compliance Requirements.** Harvey-Marion CDDO requires its screeners to comply with assessment instructions and guidelines as posted on the KDADS website regarding who should participate in the Functional Assessment screening, what documentation is required to substantiate answers, and how answers should be scored. Scroll down to “IDD Assessor Information” is posted on the following KDADS website link: <http://www.kdads.ks.gov/provider-home/forms>.
- 4) **Assessment Completion Requirements.** Harvey-Marion CDDO completes functional assessments within requirements of the current KDADS-CDDO contract and applicable HCBS policies. Initial functional assessments are initiated within 7 days and entered within 30 days of the date the individual is determined eligible for I/DD services in Kansas, according to the Developmental Disabilities Reform Act. Annual reassessments are completed within 365 days of the previous assessment.
- 5) **Scheduling the Functional Assessment Meeting.** The Functional Assessment assessor will start by contacting the individual/guardian for a convenient date/time, then contact the individual’s Targeted Case Manager (TCM), direct support providers, and Managed Care Organization (MCO) Care Coordinator as applicable via email of the proposed date/time for





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confirmation. The Functional Assessment assessor will make a reasonable effort to find dates that work for TCM, representatives of the person's direct support team, and MCO Care Coordinator as applicable. The person's TCM is responsible for assuring that additional appropriate people (for example, teacher or therapist) are invited to the meeting and coordination/notification of any change in the meeting time or location.

- 6) **Rescheduling.** If the Functional Assessment meeting is cancelled and rescheduled, the rescheduled meeting will be held as soon as participant schedules allow and within the 365-day requirement. The assessor will initiate rescheduling following the same process described above.
- 7) **Functional Assessment Meeting Attendance.** Functional Assessment meeting attendance should include the person being assessed, the guardian, the TCM, direct support staff from applicable service areas, the MCO Care Coordinator if/as available, and the Functional Assessment assessor. Special accommodations for the person being assessed will be arranged if needed (for example, discomfort with meeting attendance).
- 8) **Direct Support Service Providers Will Submit Documentation for Functional Assessment.**
  - a. **Any documentation that would be useful for the Functional Assessment.** There may be other documentation that is needed and will be requested or documentation that the provider may decide to provide that would be helpful in conducting a complete and accurate Functional Assessment.
- 9) **Functional Assessment Meeting Signature Sheet.** Meeting participants will be asked to sign an attendance sheet indicating the information they provided during the screening was truthful and accurate.
- 10) **Dispute/Appeal Process. The best way to eliminate disputes is for the provider(s) support network supporting the individual to provide current, accurate and thorough support information to the assessor according to the above time frames.** If the outcome of a Functional Assessment is that an individual scores ineligible for HCBS-IDD supports, the individual and his/her legally responsible party will be provided a Notice of Action with appeal rights, procedures, and timelines.





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**Special Permission Assessment Requests.** Permission for special reassessment outside of the annual assessment cycle can be granted only by the HCBS IDD Program Manager. In compliance with requirements that have been posted on the KDADS website, Harvey-Marion County CDDO will consider submitting a request for permission for special reassessment only upon receipt of documentation of the following circumstances:

1. **The individual has experienced a life altering event, and;**
2. **The event is likely to continue for the foreseeable future, and;**
3. **As a result of the event, the person requires additional staff support.**

**11) Reassessment for individuals eligible and waiting for HCBS/IDD program, who are awarded new HCBS IDD program funding.** If the last assessment completed was greater than 365 days ago, and, it has been determined that HCBS IDD program funding is available to serve the person (either through waiting list, crisis, exception, or other KDADS-approved priority or program transfer), then Harvey- Marion County CDDO will update the functional assessment to determine HCBS/IDD program eligibility as required.

