

## INSTRUCTIONS FOR COMPLETING MA-51 MEDICAL EVALUATION

**NOTE: THE MA-51 IS VALID AS LONG AS IT REFLECTS THE CURRENT CONDITIONS FOR THE APPLICANT**

At the top of the page, mark if this is a new or updated MA-51.

Questions 1-7 are self-explanatory.

8. **Physician License Number.** Enter the physician license number, not the Medical Assistance number.
9. **Evaluation At.** Enter 1-5 to describe where evaluation took place. If 5 is used, specify where evaluation was completed.
10. **Signature.** Applicant should sign if able. If unable, legal guardian or responsible party may sign.
11. **Essential Vital Signs.** Self-explanatory.
12. **Medical Summary.** Include any medical information you feel is important for determination of level of care. **Please list patient's known allergies in this section.**
13. **Vacating of building.** How much assistance does the patient require to vacate the building?
14. **Medication Administration.** Is the patient capable of being trained to self-administer medications?
15. **Diagnostic Codes and Diagnoses.** ICD diagnostic codes should be put in the blocks, then written by name in the space next to the block. List diagnoses starting with primary, then secondary, and finally tertiary. There is room for any other pertinent diagnoses.
16. **Professional and Technical Care Needs.** Indicate care needed. Examples of "other" include mental health and case management.
17. **Physician Orders.** Orders should meet needs indicated in box 16. Medications should have diagnoses to support their use.
18. **Prognosis.** Indicate patient's prognosis based on current medical condition.
19. **Rehabilitation Potential.** Indicate based on current condition. Should be consistent with box 18.
- 20A. **Physician's Recommendation.** Physician must recommend patient's level of care. If the box for "other" is checked, write in level of care. In order to provide assistance to a physician in the level of care recommendation, the following definitional guidelines should be considered:

Nursing Facility Clinically Eligible (NFCE)	Personal Care Home	ICF/MR Care	ICF/ORC Care	Inpatient Psychiatric Care
Requires health-related care and services because the physical condition necessitates care and services that can be provided in the community with Home and Community Based Services or in a Nursing Facility.	Provides Personal Care services such as meals, housekeeping, & ADL assistance as needed to residents who live on their own in a residential facility.	Provides health-related care to MR individuals. More care than custodial care but less than in a NF.	Provides health-related care to ORC individuals. More care than custodial care but less than in a NF.	Provides inpatient psychiatric services for the diagnoses and treatment of mental illness on a 24-hour basis, by or under the supervision of a physician.

**20B. Complete only if Consumer is NFCE and will be served in a Nursing Facility.** Check whether the patient will be eventually be discharged from facility based on current prognosis. If yes, check expected length of stay.

**20C. The physician must sign and date the MA-51. A licensed physician must sign the MA-51.** It may not be signed by a "physician in training" (a Medical Doctor in Training [MT] or an Osteopathic Doctor in Training [OT]).

Questions 21 and 22 completed by the OPTIONS Unit in the Area Agency on Aging.

MEDICAL EVALUATION

NEW

UPDATED

1. MA RECIPIENT NUMBER	2. NAME OF APPLICANT (Last, first, middle initial)	3. SOCIAL SECURITY NO.	4. BIRTHDATE	5. AGE	6. SEX
7. ATTENDING PHYSICIAN			8. PHYSICIAN LICENSE NUMBER		
9. EVALUATION AT (Description and code)		10. For the purpose of determining my need for TITLE XIX INPATIENT CARE, Home and Community Based Services, and if applicable, my need for a shelter deduction, I authorize the release of any medical information by the physician to the county assistance office, Pennsylvania Department of Human Services or its agents.			
01 Hospital 02 NF 03 Personal Care/Dom Care 04 Own House/Apartment 05 Other (Specify) _____		SIGNATURE - APPLICANT OR PERSON ACTING FOR APPLICANT		DATE	

11. HEIGHT	WEIGHT	BLOOD PRESSURE	TEMPERATURE	PULSE RATE	CARDIAC RHYTHM
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12. MEDICAL SUMMARY

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13. IN EVENT OF AN EMERGENCY THE PATIENT CAN VACATE THE BUILDING	14. PATIENT IS CAPABLE OF ADMINISTERING HIS/HER OWN MEDICATIONS
<input type="checkbox"/> 1. Independently <input type="checkbox"/> 2. With Minimal Assistance <input type="checkbox"/> 3. With Total Assistance	<input type="checkbox"/> 1. Self <input type="checkbox"/> 2. Under Supervision <input type="checkbox"/> 3. No

15. ICD DIAGNOSTIC CODES

	PRIMARY (Principal)
	SECONDARY
	TERTIARY

16. PROFESSIONAL AND TECHNICAL CARE NEEDED - CHECK  EACH CATEGORY THAT IS APPLICABLE

<input type="checkbox"/> Physical Therapy	<input type="checkbox"/> Speech Therapy	<input type="checkbox"/> Occupational Therapy	<input type="checkbox"/> Inhalation Therapy	<input type="checkbox"/> Special Dressings	<input type="checkbox"/> Irrigations
<input type="checkbox"/> Special Skin Care	<input type="checkbox"/> Parenteral Fluids	<input type="checkbox"/> Suctioning	<input type="checkbox"/> Other (Specify) _____		

17. PHYSICIAN ORDERS

Medications \_\_\_\_\_

Treatment \_\_\_\_\_

Rehabilitative and Restorative Services \_\_\_\_\_

Therapies \_\_\_\_\_

Diet \_\_\_\_\_

Activities \_\_\_\_\_

Social Services \_\_\_\_\_

Special Procedures for Health and Safety or to Meet Objectives \_\_\_\_\_

18. PROGNOSIS - CHECK <input checked="" type="checkbox"/> ONLY ONE	19. REHABILITATION POTENTIAL - CHECK <input checked="" type="checkbox"/> ONLY ONE
<input type="checkbox"/> 1. Stable <input type="checkbox"/> 2. Improving <input type="checkbox"/> 3. Deteriorating	<input type="checkbox"/> 1. Good <input type="checkbox"/> 2. Limited <input type="checkbox"/> 3. Poor

20A. **PHYSICIAN'S RECOMMENDATION**

To the best of my knowledge, the patient's medical condition and related needs are essentially as indicated above. I recommend that the services and care to meet these needs can be provided at the level of care indicated - check  only one

<input type="checkbox"/> Nursing Facility Clinically Eligible Services to be provided at home or in a nursing facility	<input type="checkbox"/> Personal Care Home Services provided in a Personal Care Home	<input type="checkbox"/> ICF/MR Care Services to be provided at home or in an Intermediate care facility for the mentally retarded	<input type="checkbox"/> ICF/ORC Care Services to be provided at home or in an Intermediate care facility for consumers with ORCs	<input type="checkbox"/> Inpatient Psychiatric Care	<input type="checkbox"/> Other (Please Specify) _____
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20B. **COMPLETE ONLY IF CONSUMER IS NURSING FACILITY CLINICALLY ELIGIBLE AND WILL BE SERVED IN A NURSING FACILITY.**

ON THE BASIS OF PRESENT MEDICAL FINDINGS THE PATIENT MAY EVENTUALLY RETURN HOME OR BE DISCHARGED.  YES  NO If Yes, Check  Only One  1. Within 180 days  2. Over 180 days

20C. **PHYSICIAN'S SIGNATURE**

\_\_\_\_\_  
 PHYSICIAN (PRINTED NAME)                      TELEPHONE                      PHYSICIAN SIGNATURE                      DATE

**FOR DEPARTMENT USE** Medical and other professional personnel of the Medicaid agency or its designee MUST evaluate each applicant's or recipient's need for admission by reviewing and assessing the evaluations required by regulations.

21A. <b>MEDICALLY ELIGIBLE</b> <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Medically Appropriate for Waiver Services	21B. <b>Length of Stay</b> <input type="checkbox"/> Within 180 days <input type="checkbox"/> Over 180 days
22 <b>Comments. Attach a separate sheet if additional comments are necessary.</b>	
REVIEWER'S SIGNATURE AND TITLE	DATE

<b>EVALUATION (CIRCLE ALL THAT APPLY IN EACH CATEGORY)</b>			
<b>COMMUNICATION</b>	1. TRANSMITS MESSAGES/RECEIVES INFORMATION 2. LIMITED ABILITY 3. NEARLY OR TOTALLY UNABLE	<b>SPEECH</b>	1. SPEAKS CLEARLY W/OTHERS 2. LIMITED ABILITY 3. UNABLE TO SPEAK CLEARLY OR NOT AT ALL
<b>HEARING</b>	1. GOOD 2. HEARING SLIGHTLY IMPAIRED 3. LIMITED HEARING (E.G. MUST SPEAK LOUDLY) 4. VIRTUALLY/COMPLETELY DEAF	<b>SIGHT</b>	1. GOOD 2. VISION ADEQUATE-UNABLE TO READ DETAILS 3. VISION LIMITED-GROSS OBJECT DIFFERENTIATION 4. BLIND
<b>AMBULATION</b>	1. NO ASSISTANCE 2. WITH THE AID OF: _____ 3. SUPERVISION ONLY 4. REQUIRES HUMAN TRANSFER W/O EQUIP. 5. BEDFAST	<b>BATHING</b>	1. NO ASSISTANCE 2. SUPERVISION ONLY 3. ASSISTANCE 4. SHOWER 5. TUB 6. SPONGE BATH
<b>ENDURANCE</b>	1. TOLERATES DISTANCES (250' SUSTAINED ACTIVITY) 2. NEEDS INTERMITTENT REST 3. RARELY TOLERATES SHORT 4. NO TOLERANCE	<b>FEEDING</b>	1. NO ASSISTANCE 2. MINOR ASSISTANCE, NEEDS TRAY SET-UP ONLY 3. HELP W/FEEDING/ENCOURAGING 4. IS FED 5. TUBE FED
<b>TOILETING</b>	1. NO ASSISTANCE 2. ASSISTANCE TO & FROM & TRANSFER 3. TOTAL ASSISTANCE & INCLUDING PERSONAL HYGIENE, HELP WITH: A. BATHROOM B. CLOTHING C. BEDSIDE COMMUNE D. BEDPAN	<b>MENTAL STATUS</b>	1. ALERT 2. CONFUSED 3. DISORIENTED 4. COMATOSE
		<b>BEHAVIOR STATUS</b>	1. AGREEABLE 2. DISRUPTIVE 3. APATHETIC 4. COMBATIVE, AGGRESSIVE 5. WANDERS ___ DAY ___ NIGHT
<b>DRESSING</b>	1. DRESSES SELF 2. MINOR ASSISTANCE 3. NEEDS HELP TO COMPLETE DRESSING 4. HAS TO BE DRESSED	<b>WHEELCHAIR USE</b>	1. INDEPENDENT 2. ASSISTANCE IN DIFFICULT MANEUVERING 3. WHEELS A FEW FEET 4. UNABLE TO USE FEET 5. NA
<b>SKIN CONDITION</b>	1. INTACT 2. DRY/FRAGILE 3. IRRITATION (RASH) 4. OPEN WOUND 5. DECUBITUS # _____ STAGE _____	<b>BOWEL &amp; BLADDER CONTROL</b>	1. CONTINENT 2. RARELY CONTINENT 3. OCCASIONAL- ONCE/WEEK OR LESS 4. FREQUENT-UP TO ONCE A DAY 5. TOTAL INCONTINENCE 6. OSTOMY/ILEOSTOMY
<b>DECISION MAKING</b>	1. ABLE TO HANDLE OWN FINANCES 2. UNABLE TO HANDLE OWN DECISIONS	<b>HOSPICE</b>	1. NEEDS HOSPICE CARE 2. DOES NOT NEED HOSPICE CARE
<b>FALLS</b>	1. NOT AT RISK FOR FALLS 2. AT RISK FOR FALLS	<b>DIET</b>	1. REGULAR 2. SPECIAL _____
<b>MOUTH</b>	1. NATURAL TEETH 2. EDENTULOUS 3. DENTURES <input type="checkbox"/> UPPER <input type="checkbox"/> LOWER	<b>SLEEP HABITS</b>	1. NORMAL 2. AWAKE FREQUENTLY AT NIGHT 3. DIFFICULTY FALLING ASLEEP 4. NAPS DURING THE DAY
<b>RECENT SURGERIES/FRACTURES</b>			
<b>PHYSICIAN NAME (PLEASE PRINT)</b>		<b>PHYSICIAN SIGNATURE</b>	
<b>ADDRESS</b>	<b>PHONE</b>	<b>DATE SIGNED</b>	
	<b>FAX</b>		