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Transmittal

To: All Assisted Living Providers

From: Carol Fenderson, Deputy Director, State Programs *CMF*

Date: July 22, 2025

Re: Using Simplified Resident Forms

A simplified Resident Assessment Tool (RAT) was piloted in 2012 with a small group of providers. Their feedback was incorporated into a new assessment tool, which has been in effect since 2013.

Prior to 2013 Requirement
Health Care Practitioner Physical Assessment AND Delegating Nurse (DN) Assessment•
Assisted Living Manager's Assessment AND Service Plan
Level of Care Scoring Tool



Current after 2013
Resident Assessment Tool (2013 version)
Service Plan
Level of Care Scoring Tool – Not Required

*When the revised RAT is completed by the DN, it will meet the requirements for the RAT and the DN's assessment. If the RAT is completed by someone other than the DN, the DN is still required to document their own assessment.

A few facts about the revised form:

1. It is optional. You may continue to use the 3-part RAT instead.
2. If you require a Level of Care score for Medicaid Waiver, you must continue using the 3-part RAT.
3. If you use the revised RAT, you must also use the corresponding revised Service Plan. There are no exceptions to this. (However, it is acceptable to use the revised Service Plan with the 3-part RAT.)
4. Deficiencies may result if the forms are not completed in their entirety.