Options Counseling in and NWD/ADRC System National, State & Local Perspectives
Introductions

- Joseph Lugo, Administration on Community Living
- Sara Tribe, NASUAD
- Maurine Strickland, Wisconsin
- Barbara Diehl, Virginia Prince William County AAA
Session format

- Part I: National Perspective of Options Counseling
  - ACL Overview – NWD/ADRC System

- Part II: Pose a question or topic
  Panelist response
  - National perspectives
  - State perspective
  - Local perspective

- Part III: Pose questions to Audience
  - Engage in discussion
Approach Session - Fresh Start

- We each bring our own perspective on what is I&R or Options Counseling
- Start Fresh – Try not to judge too quickly
- What you have seen or heard might not be the whole story....
“The vision is to have Resource Centers in every community serving as highly visible and trusted places where people of all ages and income levels can turn for information and options counseling on their long-term care options.”

-AoA/CMS 2003 ADRC Program Announcement
A State Scorecard on Long-Term Services and Supports for Older Adults, People with Physical Disabilities, and Family Caregivers

This Scorecard finds that generally states with the highest level of performance have enacted public policies designed to:

- Improve access to services and choices in their delivery by directing state Medicaid programs to serve more people in need and offer alternatives to nursing homes that most consumers prefer.

- Establish a single point of system entry to help people find needed information and more easily access services.

- Improve support for family caregivers by offering legal protections as well as other services to address caregiver needs.

Susan C. Reinhard, Enid Kassner, Ari Houser, and Robert Mollica
September 2011

http://www.longtermscorecard.org/
Community Scan – Potential Buyers

- Medicare FFS/MAP/SNP
- OAA
- Medicaid
- VA Medical Center
- Private Insurance
- PACE
- Employer Assistance Programs
- Employer Insurance Plans
2012 Aging and Disability Resource Center Awards
Administration for Community Living, Center for Medicare & Medicaid Services, Veterans Health Administration

Indicates States Awarded Part A (8)
States & Territories Awarded Part B (36)
Indicates States & Territories Not Eligible for Part B Funding
Indicates States & Territories that Did Not Apply for Part B Funding
The NWD/ADRC System

Sources of Referral to ADRC Options Counseling

Determines Individuals’ Need For/Interest in Option Counseling

Support Any Immediate LTSS Needs, Conducts Personal Interview and Identifies Strengths and Preferences

Comprehensive review of private resources, informal caregiver supports and screening for Public Programs

Develops Person Centered LTSS Plan

Person Centered Options Counseling

Linking Individuals to Private Pay Resources

Helps individuals connect to services that will be covered out of pocket or through other community resources

Streamline Access to Public Programs

Preliminary Functional Eligibility Assessment for Public Programs:
Collects any additional functional data needed for public programs including, if appropriate, Medicaid.

Final Determination of Functional Eligibility for Public Programs:
Completes the process that officially determines that individuals are eligible for public programs.

Preliminary Financial Eligibility Assessment for Public Programs:
Supports the individual in submitting applications for public programs including, if appropriate, Medicaid.

Final Determination of Financial Eligibility for Public Programs:
Completes the process that officially determines that individuals are eligible for public programs.

Follow-up

Ensures service initiation and, as needed, provides on-going care coordination and participant directed support

Administration of the ADRC/NWD System

Management Information Systems
A MIS which allows information/data to flow with client and through the system

Quality Assurance Program
Continuous quality improvement supported by electronic information systems

State Administration, Governance & Financing
Responsibility for managing the state’s single ADRC/NWD System
When is an Option Counselor Needed?

- Request Specific Setting (Personal Interview)
- Risk of Institutional Placement
- Period of Transition
- Facilitate Participant Direction
- Requests/Requires Pre-Application Assistance
- Requests/Requires a Person Centered Plan
- Requests/Requires Follow-up
National Options Counseling Training Demonstration Timeline

**Standards**
- Personal Interview
- Exploring Options/Planning
- Decision Support
- Collaboration with Individual to Develop Action Steps or Long Term Support Plan
- Access to Community Supports
- Follow-up

**Job Duties**
- Conduct One-to-One Person Centered Interview
- Support Individual Decision Making to Develop Person Centered Plan
- Facilitate Streamlined Access to LTSS
- Ongoing Follow Up and Documentation

**Competencies**
- Knowledge
- Skills/Abilities

**Training**
- Build upon current best practice
- Design curriculum based on Standards, Job Duties and Competencies
- Vision - Combination of Online and Face-to-Face Training

**Certification**
- Creation of National Advisory Council for guidance and input
- Leverage existing national certification efforts
Panel Discussion –
Being a Leader Has Risk
Question #1

Developing standards for Options Counseling is occurring nationally.

- What are the key characteristics/job duties that define Options Counseling from your perspective?

- Please share your thoughts on the benefits of having standards in place for options counseling.

Panelist response:
- National perspectives
- State perspective
- Local perspective
Question #2

What are some of the key attributes and benefits that Options Counseling brings to individuals/families from your perspective?

Panelist response:
- National perspectives
- State perspective
- Local perspective
Question #3

In your opinion, what situations and/or characteristics do staff look for to indicate that a client would benefit from more intensive assistance offered by options counseling?

- *What does the transition/hand-off of the client look like?*

- *How can staff work to make this transition as seamless as possible?*
Question #4

What national, state or local funders appear to be interested in paying for Options Counseling?

Why is that from your perspective?

Panelist response:
• National perspectives
• State perspective
• Local perspective
Question #5

Developing a national Options Counseling Training program is occurring through 8 states and nationally.

- Please share your thoughts on what key aspects need to be considered with a national training program?

Panelist response:
- National perspectives
- State perspective
- Local perspective
Audience Interaction/Discussion

• Break up into small groups (3-5 People)
• Please work together to answer the following questions?

  • #1: What are the key characteristics/job duties that define Options Counseling from your perspective? What are the benefits of having OC standards?

  • #2: What key attributes/benefits that Options Counseling brings to individuals/ families from your perspective?

  • #3: What situations/characteristics do you look for to indicate someone could benefit from Options Counseling? How do we make that a seamless process?

  • #4: How does your organization fund (anticipate funding) Options Counseling? What national, state or local funders (public and/or commercial) appear to be interested in paying for Options Counseling? Why is that from your perspective?

  • #5: Developing a national Options Counseling Training program is occurring through 8 states and nationally. Please share your thoughts on what key aspects need to be considered with the development of a national training program?

• Groups - Report Out
Wrap-up