

Level of Care Meeting

2/29/12

Attendance: Joelyn Karlson (Summit CB), Teresa Davis (Buckeye Community Services), Anita Allen (OPRA), Gary Tonks (ARC), Dee Fountain (Muskingum CB/MEORC), Tonya Hawkins (ODJFS), Laura Leach (ODJFS), Kevin Truitt (OLRS), Lori Stanfa (OACB), Patrick Stephan (DODD), Charlie Flowers (DODD), Angie Hannahs (DODD), Debbie Jenkins (DODD), Greg Swart (DODD), Lori Horvath (DODD)

1. Member introductions
2. Discussion of expectations/desired outcomes of workgroup:
 - Consistent assessments
 - Method of determining more appropriate service settings
 - Improving front door to get people in the right places
 - Improve consistency of rule interpretation
 - Promote community options for individuals with this level of care
 - Align level of care with county board eligibility
 - Develop a single process for determining level of care for HCBS and facility placement
 - Improve use of taxpayer dollars by ensuring least restrictive service options are utilized first
3. Reviewed other state initiatives related to level of care and eligibility
 - Interagency workgroup developing new criteria/tool for nursing facility levels of care. JFS has entered into a contract with Mercer for validation of this new tool.
 - JFS has contracted with Permideon to conduct a scan of how as many as 10 other states are addressing level of care determinations. Specific information will be gathered on level of care for children and for individuals with developmental disabilities who also have intensive medical needs.
 - Integrated eligibility workgroup is being led by OHT to improve efficiency with Medicaid eligibility and access to services.
 - BIPP (Balancing Incentives Payment Program) is a grant that would enable Ohio to earn an additional 2% FMAP for moving toward a 50-50 balance of funds allocated for community- and facility-based long-term services and supports. BIPP requires a single entry point or “no wrong door” for determining eligibility. It also requires states to use a core data set within the assessments used to determine eligibility for Medicaid long-term services and supports.
 - In order to access BIPP funds, states must ensure that Maintenance of Effort/Eligibility (MOE) is ensured. This means that eligibility for non-institutionally-based long-term services and supports can be no more restrictive than it was as of 12/31/10. Lori will share the CMS questions and answers regarding MOE with the group.

4. Discussed current level of care processes for HCBS waivers administered by DODD, the Transitions-DD Waiver, and ICF/MR facilities. Existing rules and assessments were included in notebooks presented to each member of the workgroup.
5. The proposed timeline for developing a new level of care criteria for individuals with developmental disabilities is January 1, 2013. This coincides with the timeline for the nursing facility LOC workgroup.
6. Discussed future meeting schedule. The group prefers longer meetings (1pm – 4pm) to be held monthly at a different location. Lori H. will survey the group about days of availability and will schedule future meetings.

Level of Care Meeting

4/26/12

Attendance: Jerilyn George (Summit CB), Teresa Davis (Buckeye Community Services), Anita Allen (OPRA), Dee Fountain (Muskingum CB/MEORC), Jenny Rousculp (Clark CB), Kevin Truitt (OLRS), Steve Mould (OHCA), Dianna Bluso (Hattie Larlham), Charlie Flowers (DODD), Debbie Jenkins (DODD), Greg Swart (DODD), Lori Horvath (DODD)

1. Updates from last meeting:
 - a. Lori H. shared some brief information regarding the Permedion reports. A link to the comprehensive reports will be shared with the group when it's available.
 - b. Laura clarified that the nursing facility level of care does not require the physician's license number. However, the license number is required on the hospital exemption form.
 - c. BIPP application is scheduled to be submitted on 4/30/12. It could be approved by CMS as early as 6/30/12, allowing Ohio to begin receiving the additional 2% FMAP starting July 1st.
2. Sample BIPP questions were shared with participants.
3. Independent Living (BIPP core data set would include shopping, meal prep, housework, phone use, transportation, medication management, employment, and money management)
 - a. Participants agreed that employment and money management should continue to be addressed through economic self-sufficiency.
 - b. Shopping: The ability to obtain or purchase one's necessary items, including groceries, clothing, and household items. Does not include handling finances or transportation.
 - i. Agreed that this category should also include the ability for the individual to identify needed items and where to purchase them.
 - c. Meal prep: The ability of an individual to prepare or cook food for oneself
 - d. Housework:
 - i. Agreed that "heavy chores" and "yard work/maintenance" should be excluded.
 - ii. Agreed to focus on ability to maintain cleanliness of the living environment as identified in the Colorado ULTC Initial Screening and Intake below:

☐ 0=The individual is independent in completing activity.

☐ 1=The individual is physically capable of performing essential housework tasks but requires minimal prompts/cues or supervision to complete essential housework tasks.

☐ 2=The individual requires substantial prompts/cues or supervision and/or physical assistance to complete essential housework tasks. The individual may be able to perform some housekeeping tasks but may require another person to complete heavier cleaning tasks.

☐ 3=The individual is dependent upon others to do all housework in his/her use area.

- e. Phone use:
 - i. Agreed that definition should no longer focus solely on phones.
 - ii. Agreed to focus on “use of technology to connect to community services and supports, including telephones, computers, mobile devices, etc.”
 - f. Transportation: Means the ability to access and use transportation
 - g. Laundry: Means the ability of an individual to wash and dry one’s clothing and household items by machine or by hand.
4. Economic self-sufficiency (BIPP core data set would include employment and money management)
- a. Agreed that focus should be on the supports necessary for an individual to obtain/maintain employment and managing money.
 - b. Would prefer the money management to be hierarchical with initial questions about identifying, securing, and accessing money, making simple purchases, then paying bills.
 - c. Accessing benefits and/or financial assistance would be eliminated from the criteria.
 - d. Need to develop questions to assess individual’s ability to work in an integrated setting making at least minimum wage. Questions will focus on the individual’s ability to complete the identified tasks independently or with accommodations/supports.
 - e. While use of the federal developmental disabilities definition was agreed upon as the basis for the ICF/DD criteria, the participants agreed that the title of this category should be modified. It implies the individual must be economically self-sufficient. An individual may possess the skills necessary to work/manage money, but be under- or unemployed due to circumstances beyond his control.
5. Receptive and Expressive Communication (BIPP core data set would include communicating)
- a. Expressive : Means ability to express needs and wants in a manner that is understandable to people who do not know the individual, using spoken, written, signed, electronic, or mechanical means.
 - b. Receptive: Means the ability to understand such communication
6. Learning (BIPP core data set would include cognitive function, memory/learning, judgment)
- a. Judgment will be addressed through self-direction.
 - b. Agreed to include questions through which the individual is able to demonstrate memory capabilities, such as identifying the day, season, and location.
 - c. Reviewed memory questions from MA Real Choice Functional Needs Assessment below:

Do you have trouble remembering things (e.g. difficulty remembering the right word, being forgetful)?

☐ No

☐ Yes (if “Yes,” complete the following questions)

Do you ever forget what someone just said to you? Do you forget what you were going to do or say?

☐ Short-term memory is OK – seems/appears to recall after 5 minutes)

☐ Short-term memory is a problem

Do you ever start to do something and then forget what comes next?

☐ Procedural memory OK – can perform all or almost all steps in a multitask sequence without cues for initiation

☐ Procedural memory is a problem

Do you ever go out of your home and forget where you are or where you are going?

☐ No

☐ Yes

Do you know what the current year is? _____

Do you know what the current season is? _____

Do you know what the current day is? _____

Do you know what the current month is? _____

Do you know what State we are in? _____

What city we are in? _____

Do you know what street you live on? _____

Can you repeat these three objects after me? APPLE? PENNY? TABLE?

☐ No

☐ Yes

Can you repeat the following phrase: "No ifs, ands, or buts"?

☐ No

☐ Yes

Can you recall the three objects I asked you to say before? (APPLE, PENNY, TABLE)

☐ No

☐ Yes

7. Self-direction (BIPP core data set would include judgment and decision-making, behavioral difficulties)

- i. Agreed that this is the area in which an individual's choice not to perform various tasks should be captured. For example, an individual may have the skills to perform all hygiene tasks, but chooses not to do so.
- ii. Judgment and decision-making
 1. Needs to capture risk to the individual, such as through exploitation, as well as risks to others.
 2. Reviewed language in current DODD waiver functional assessment and C/OEDI.
 3. MN Choices assessment listed below focuses on level of support at and away from home:

What type of support does the person need in the home for assistance with activities that require remembering, decision-making or judgment?

☐ *Someone else needs to be with the person always, to observe or provide supervision.*

☐ *Someone else needs to be around always, but they only need to check on the person now and then.*

☐ *Sometimes the person can be left alone for an hour or two.*

☐ *Sometimes the person can be left alone for most of the day.*

☐ *The person can be left alone all day and night, but someone needs to check in on the person every day.*

☐ *The person can be left alone without anyone checking in.*

What type of support does the person need to help with remembering, decision-making, or judgment when away from home?

☐ *The person cannot leave home, even with someone else, because of behavioral difficulties (becomes very confused or agitated during outings, engages in inappropriate behavior, becomes aggressive, etc.).*

- ☐ *Someone always needs to be with the person to help with remembering, decision making or judgment when away from the home.*
- ☐ *The person can go places alone as long as they are familiar places.*
- ☐ *The person does not need help going anywhere.*

4. The Wisconsin LTC Functional Screen listed below uses hierarchical approach:

(Beyond medications and finances, which are captured elsewhere)

- ☐ *0 Independent - Person can make decisions that are generally consistent with her/his own lifestyle, values, and goals (not necessarily with professionals' values and goals)*
- ☐ *1 Person can make safe decisions in familiar/routine situations, but needs some help with decision making when faced with new tasks or situations*
- ☐ *2 Person needs help with reminding, planning, or adjusting routine, even with familiar routine*
- ☐ *3 Person needs help from another person most or all of the time*

- iii. Participants would like to add a component to capture how the individual is able to recognize and respond to emergencies.
 - iv. Reviewed sample BIPP questions from SIS regarding behavior concerns.
 - v. Agreed that additional support is needed to capture the behavioral components in a person-centered way and in a manner that is not too intrusive for an assessment used for level of care and not plan development. Lori H. will consult with Willie Jones from OACB on this topic.
8. The next meeting will be held 5/24/12 from 1pm – 4pm at 1810 Sullivant Avenue in the large conference room. The agenda for the next meeting will include:
- a. Discussing criteria for medication management
 - b. Review of any guidance received from Willie Jones regarding behavior sections
 - c. How to rate/weigh/classify each item to determine whether or not a limitation exists
 - d. Identifying extended stakeholder group