

*Streamlining Access: What does it mean? How do you know what to focus on?  
What's in it for the Medicaid agency?*

*Thursday November 3, 2005 9:00-10:30am*

**Objective:** To offer a working definition of streamlined access. This session explored the critical questions states need to ask in order to streamline access to long-term care services. Grantee progress related to streamlined access was discussed as well as Wisconsin's efforts and plans to coordinate with Medicaid to streamline access. The session concluded with a discussion on strategies and challenges of streamlining access.

**Audience:** All grantees

**Moderator:** Dina Elani, Centers for Medicare and Medicaid Services (CMS)

**Speakers:** Ann Marie Ott, Wisconsin Bureau on Aging, Melissa Henderson, WI Bureau of Eligibility Management, and Mary Champine, Aging and Disability Resource Center (ADRC) Access Manager Milwaukee County Department on Aging.

Streamlining can be defined as getting consumers and family members what they need with ease and timeliness and promoting educated choices and trust. Dina talked through the three As which appear in the program announcement for ADRCs – Awareness, Assistance, and Access. She reminded grantees of the importance of access to the ADRC mission. Access also includes access to private pay resources in addition to eligibility determination. Streamlining access can be achieved through consolidating and coordinating functions, simplifying operations or making operations more effective in order to streamline access to long-term care. Dina also referenced the “**Handout- Streamlining Self-Assessment**” and described how ADRC can use the tool to assess the challenges to streamlining in their states.

## Simplify Operations

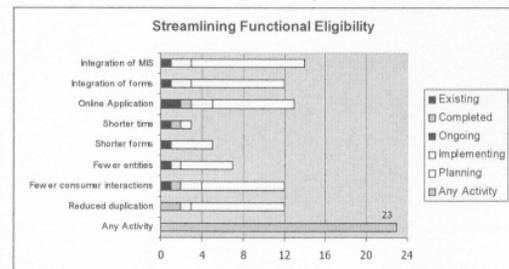
- Development of web-based applications for services
- Redesigning forms to be more user friendly and shorter
- Standardized instruments across systems and populations

## Make Operations More Effective

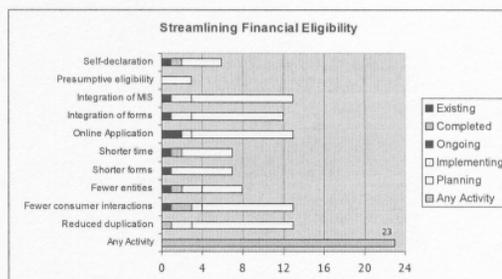
- Rapid response initiatives for determining eligibility
- Self-declaration of financial resources and presumptive eligibility

## Status of Grantees with Streamlining Access

## Streamlining Functional Eligibility



## Streamlining Financial Eligibility



## Keys to Success

- Identify the areas where your system could be streamlined
- Buy-in with Medicaid agency to coordinate functional and financial eligibility
- Develop clear goals & strategy to accomplish them
- Identify outcome measures to track overtime

## Streamlining Access to LTC:

### What does it mean?

Dina Elani  
CMS  
November 4, 2005

## Streamlining Access General Definition

Getting the consumer and family members what they need with:

- Ease
- Timeliness
- Educated Choice
- Trust

## Goals & Functions of an ADRC

### Awareness & Information

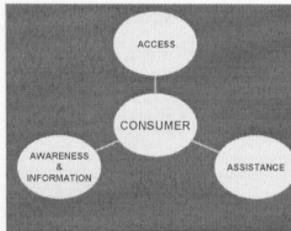
- Public Education
- Information on Options

### Assistance

- Options Counseling
- Benefits Counseling
- Employment Options Counseling
- Referral to services
- Crisis Intervention
- Planning for Future Needs

### Access

- 1-Stop Access to all Public Programs:
  - Eligibility Screening
  - Comprehensive Assessment
  - Medicaid Functional Elig. Determination
  - Medicaid Financial Elig. Determination
- Also access to Private Pay Services



## ACCESS FUNCTIONS

1-Stop Access to all Public Programs:

- Eligibility Screening
- Comprehensive Assessment
- Medicaid Functional Elig. Determination
- Medicaid Financial Elig. Determination
- Elig. Determinations for Other Public Programs

Also access to Private Pay Services

## How to Streamline Access

1. Consolidate & coordinate functions
2. Simplify operations
3. Make operations more effective

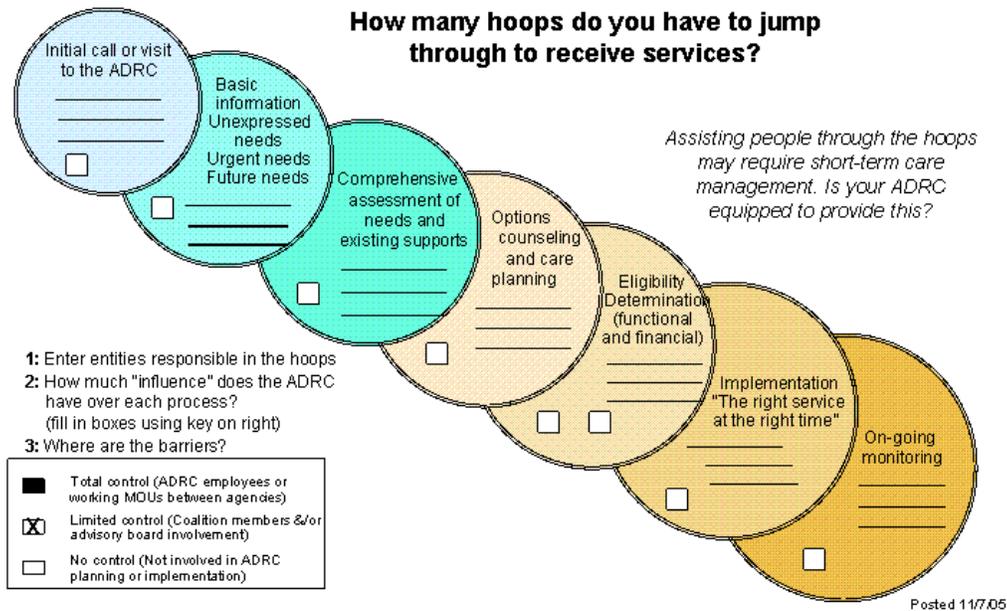
## Consolidate and Coordinate Functions

- Co-location of functional (LOC) & financial determination staff
- Management information systems enhancement
- Written protocols for coordination across agencies



## Streamlining Self-Assessment

GOAL: Seamless entry into long term supports for consumers



### Ann Marie Ott, Wisconsin Bureau on Aging

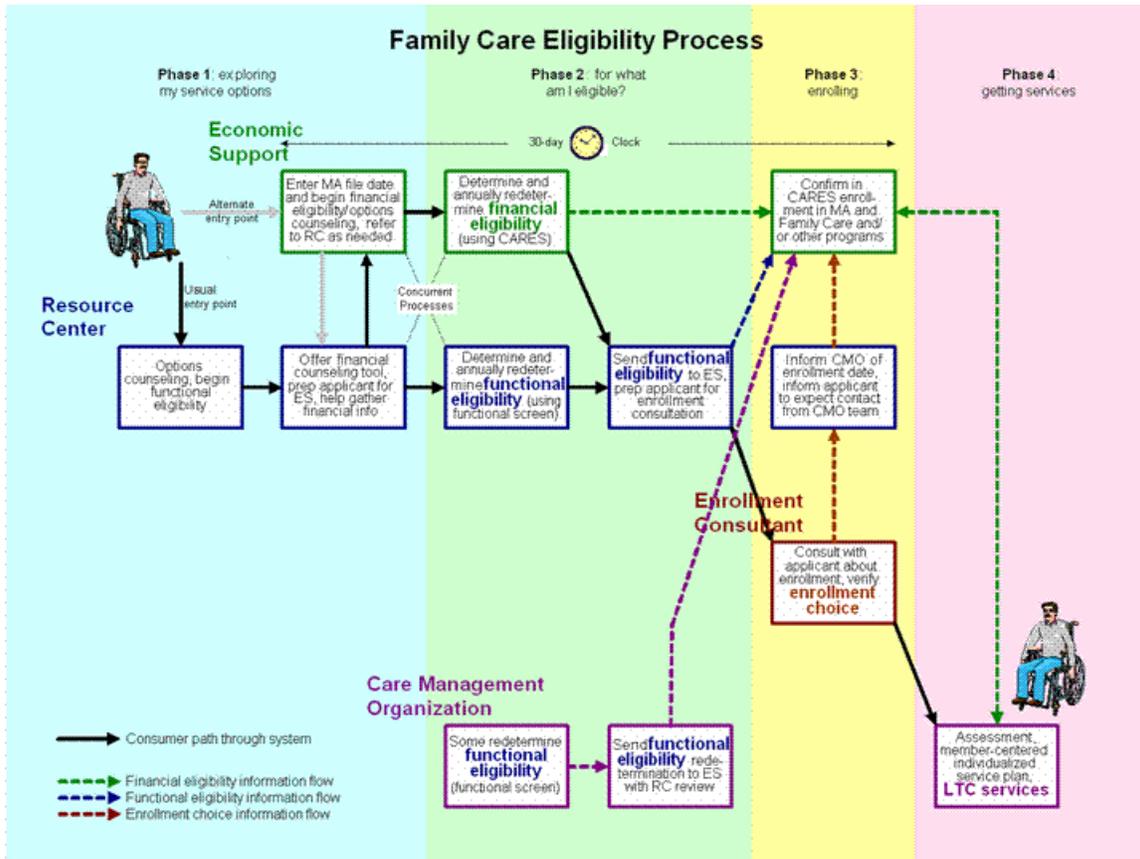
Wisconsin staff spoke to the accomplishments and challenges in working with Bureau of Eligibility Management to streamline access to long-term care services. Specific questions addressed were

- What strategies were considered in streamlining access?
- Why did you decide on the ones you did?
- What were the challenges and lessons learned?
- What are the critical components to have in place regarding streamlining access? What are the deal breakers?
- What was the "carrot" or incentive for participation from the Medicaid agency (Bureau of Eligibility Management)?

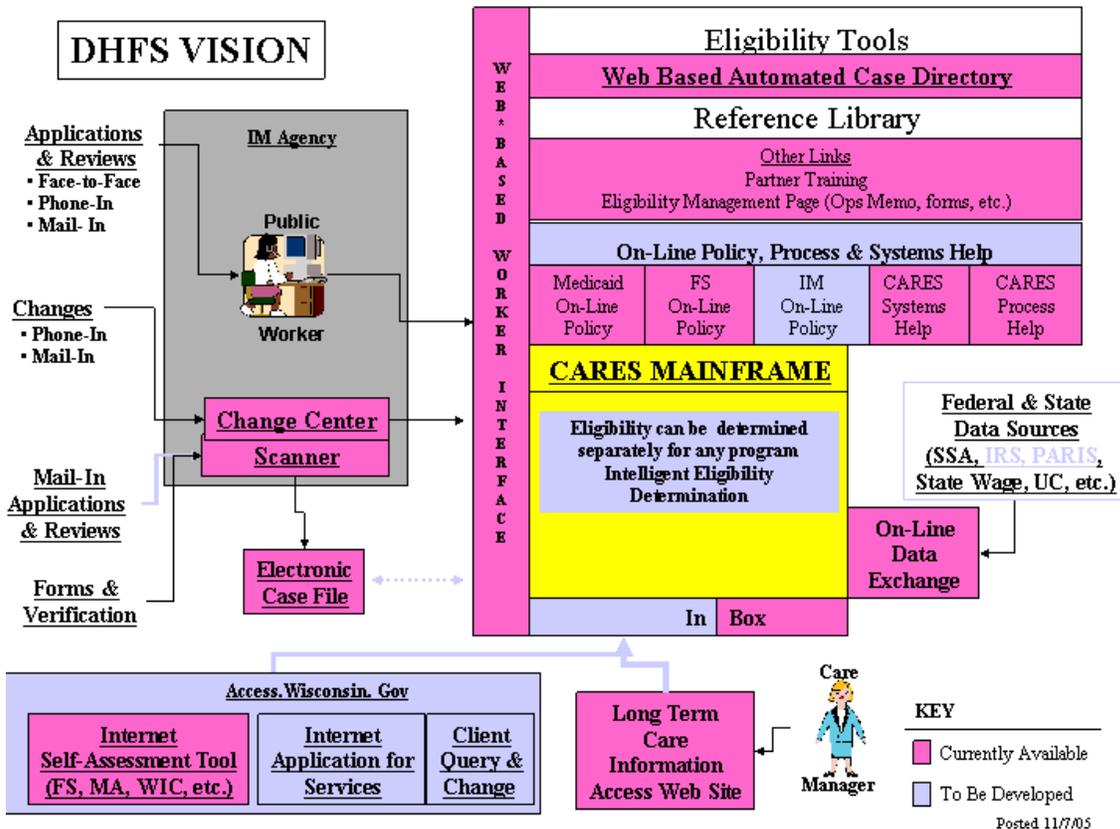
Ann Marie described the Wisconsin system which was transformed with the re-designed long-term care system, Family Care. The full Family Care model operates in five counties. Ann Marie spoke about the Streamlining Self Assessment which Dina introduced. The analogy of jumping through hoops demonstrates the many steps it takes to make sure someone is receiving the right services at the right time.

In Wisconsin, this eligibility process is demonstrated through the chart titled "**Family Care Eligibility Process,**" (below) which documents four phases of eligibility determination. The phases are: 1) exploring my service options; 2) for what am I eligible?; 3) enrolling; and 4) getting services. When a person contacts

the ADRC, options counseling and functional eligibility processes begin, if appropriate. The ADRC can prepare individuals to meet with Economic Support, the agency that determines financial eligibility. The ADRC workers determine functional eligibility using the LTC functional screen. They then prepare individuals for enrollment consultation in which applicants who have qualified are counseled about their options for enrollment.



Wisconsin has been working on enhancements in term of information technology to make the process more streamlined for the consumer. **Melissa Henderson** presented on how that process has developed in Wisconsin. Melissa walked the audience through **“Wisconsin Vision of LTC Access and Eligibility”** (below). As seen below in the **“Screenshot of ACCESS”** (below), ADRC workers can quickly assess an individual’s potential eligibility, check the status of an application, and/or find answers to common questions by using the on-line tool. They continue to work on the tool to receive on-line applications in the future.



<https://access.wisconsin.gov/access/>

**Mary Champine** detailed how the eligibility process works at the county level in Milwaukee County. She spoke about the coordination needed between the ADRC and the financial eligibility workers in order to streamline access for the large volume of individuals they serve.

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Key Components of Streamlining Access from AoA ADRC program announcement 2005

- development of web-based applications for services;
- collocation of functional (LOC) and financial determination staff;
- redesigning forms to be more user friendly and shorter;
- protocols and management information systems for the submission and exchange of information across agencies;
- rapid response initiatives for determining eligibility; self-declaration of financial resources and presumptive eligibility;
- written protocols for coordination across agencies;
- standardized instruments across systems and populations

**Questions:**

**MD-** What are the details of the access plan? Do you have presumptive eligibility? MD is in the process of discussing presumptive eligibility and who will pay for errors. They felt that if the federal government would do risk sharing, it would be better.

**Ann Marie Ott** - WI does not have presumptive eligibility per say, but they do have self declaration of income which was rolled out in 2001. It was difficult for Economic Support workers to accept at first.

**Greg Case** asked what else states are doing.

**IA** – They use other funds while people are waiting for services. Could you comment on the role of the AAA in the ADRC and access to non-Medicaid benefits?

**Peggy Herbeck** - In La Crosse County Wisconsin they work closely with the County Aging Unit to coordinate and educate about Older Americans Act (OAA) services. Staff know all benefits and programs available.

**Mary Champine** - In Milwaukee, they have adult day centers where individuals can make on-line applications. They also offer information about OAA programs. They serve many non-Medicaid individuals. They process many requests for energy assistance.

**MT** – How do you handle the 30 day period when a client may be having a difficult time getting the required information?

**Ann Marie Ott** - There is much coordination and communication between Economic Support and the ADRC. In the access plans, ADRCs workers are allowed to assist individuals get required information and they can also ask for a 10 day extension.

**Mary Champine** - Milwaukee also has a tracking system so they can tell where applications are being held up and delayed during the 30 day time period. Supervisors review cases status on a weekly basis. ADRC workers have had to develop a level of expertise in Medicaid policy and process.

**AL**- What is the interface with ILCs?

**Ann Marie Ott** - The model integrated aging units and brought other programs together.

**Peggy Herbeck** - La Crosse County, WI coordinates and works closely with the ILC. It is important to get past the silo idea and to emphasize working together.