

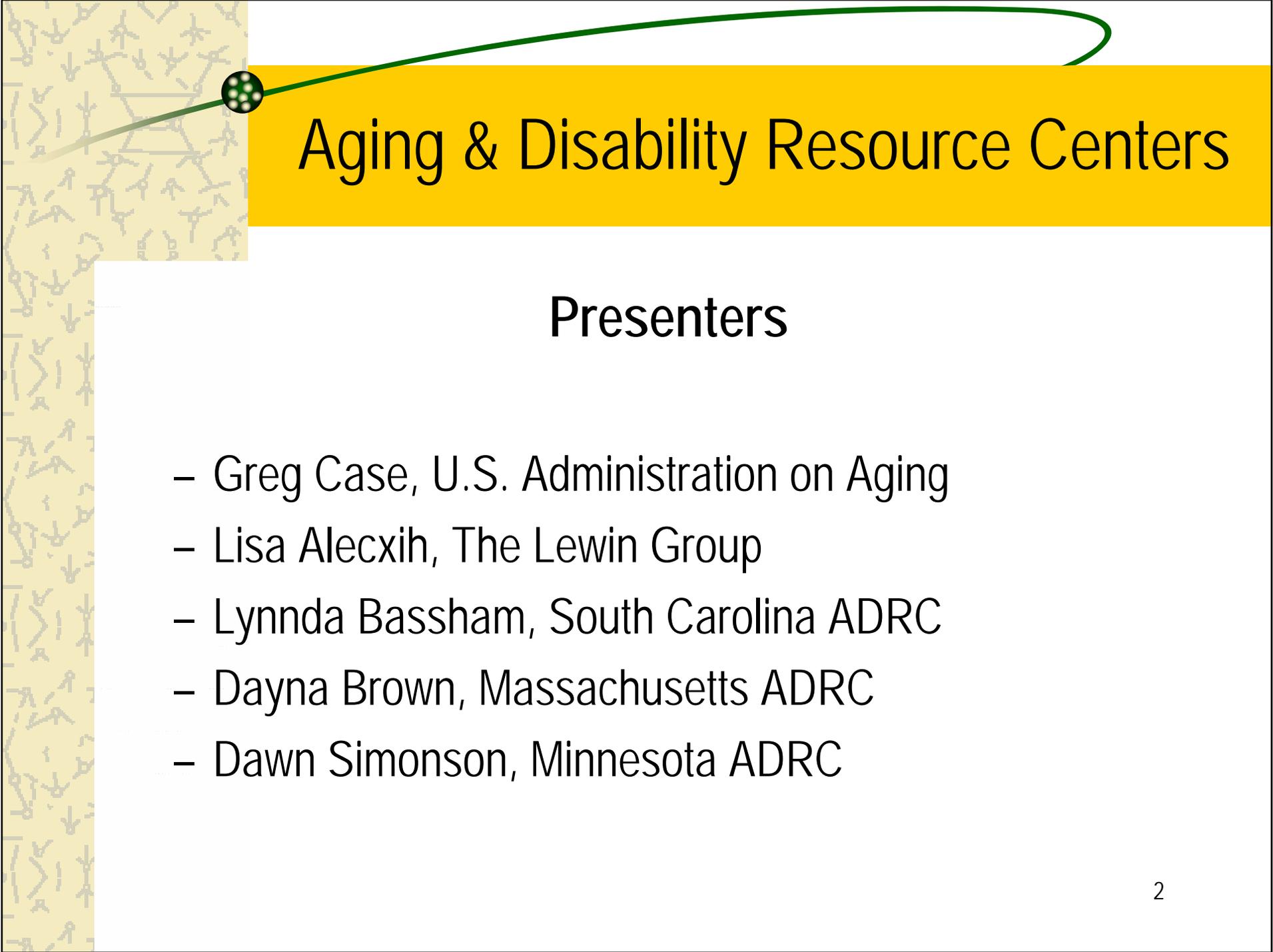


# Aging & Disability Resource Centers: Streamlining Access to Long Term Care

29<sup>th</sup> Annual n4a Conference

Atlanta, Georgia

July 11, 2004



# Aging & Disability Resource Centers

## Presenters

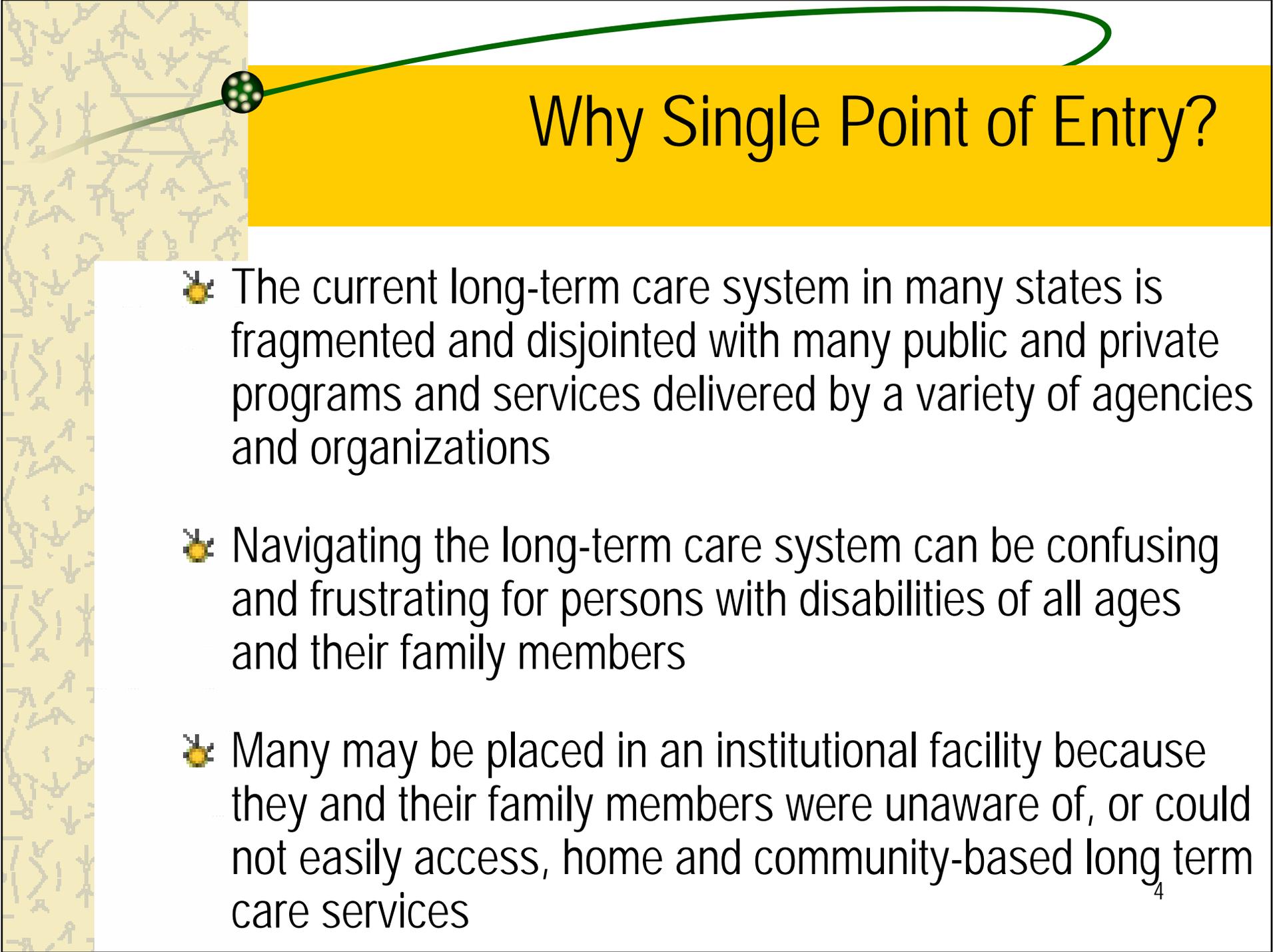
- Greg Case, U.S. Administration on Aging
- Lisa Alecxih, The Lewin Group
- Lynnda Bassham, South Carolina ADRC
- Dayna Brown, Massachusetts ADRC
- Dawn Simonson, Minnesota ADRC



# Aging & Disability Resource Centers

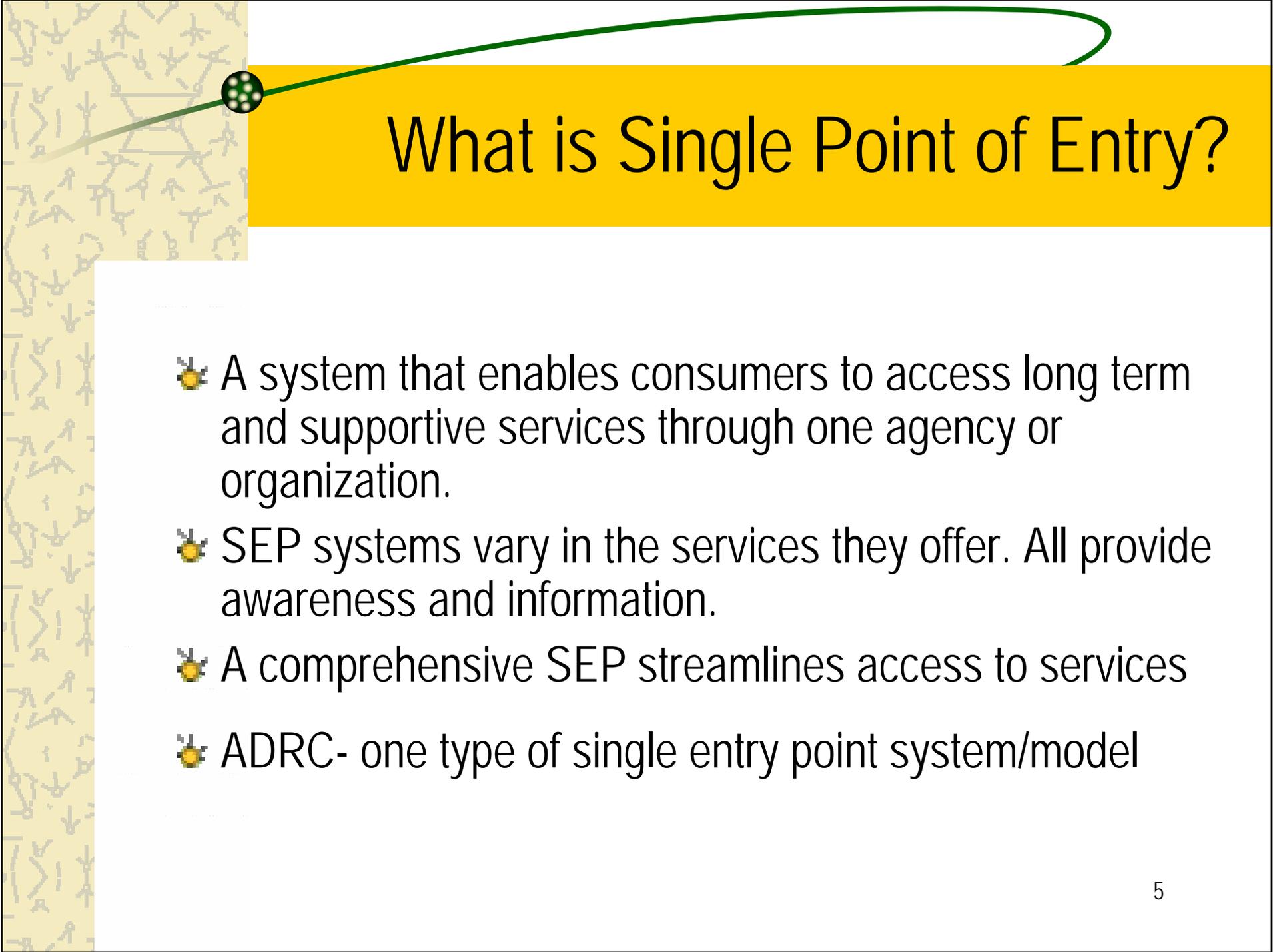
## Agenda

- Program Overview
- ADRC Technical Assistance Exchange
- ADRC Project Panel Q&A



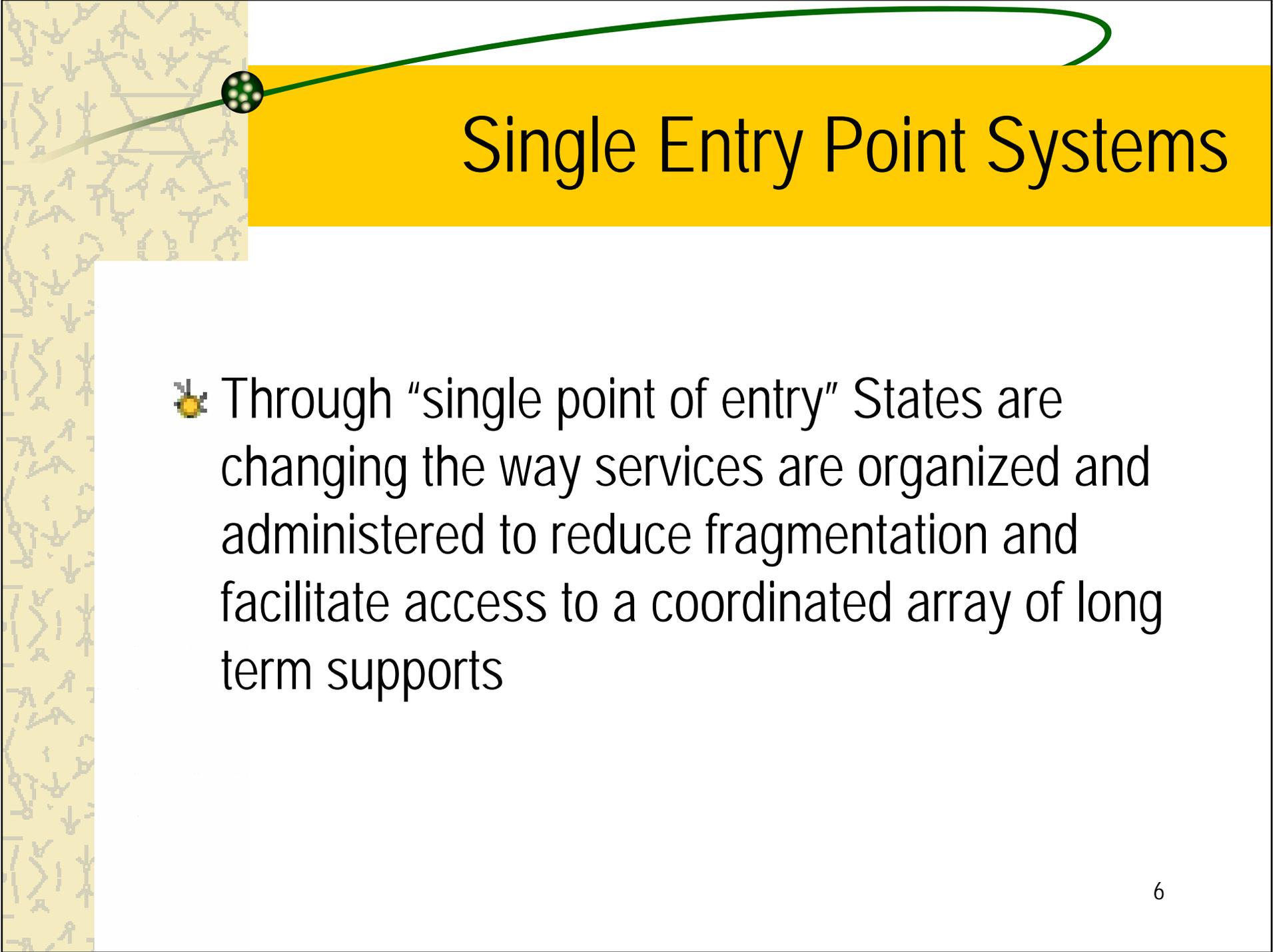
# Why Single Point of Entry?

- ✿ The current long-term care system in many states is fragmented and disjointed with many public and private programs and services delivered by a variety of agencies and organizations
- ✿ Navigating the long-term care system can be confusing and frustrating for persons with disabilities of all ages and their family members
- ✿ Many may be placed in an institutional facility because they and their family members were unaware of, or could not easily access, home and community-based long term care services



# What is Single Point of Entry?

- ✿ A system that enables consumers to access long term and supportive services through one agency or organization.
- ✿ SEP systems vary in the services they offer. All provide awareness and information.
- ✿ A comprehensive SEP streamlines access to services
- ✿ ADRC- one type of single entry point system/model



# Single Entry Point Systems

- ✿ Through “single point of entry” States are changing the way services are organized and administered to reduce fragmentation and facilitate access to a coordinated array of long term supports



# Aging & Disability Resource Center Grant Program

- ✿ HHS Initiative Jointly Administered by the Administration on Aging and the Centers for Medicare & Medicaid Services
- ✿ New Freedom Initiative/Real Choice Systems Change
- ✿ Awards to state agencies coupled with a National Technical Assistance Program



# ADRC Vision

- ✿ To create a single, coordinated system of information and access for all persons seeking long term support to minimize confusion, enhance individual choice, and support informed decision-making

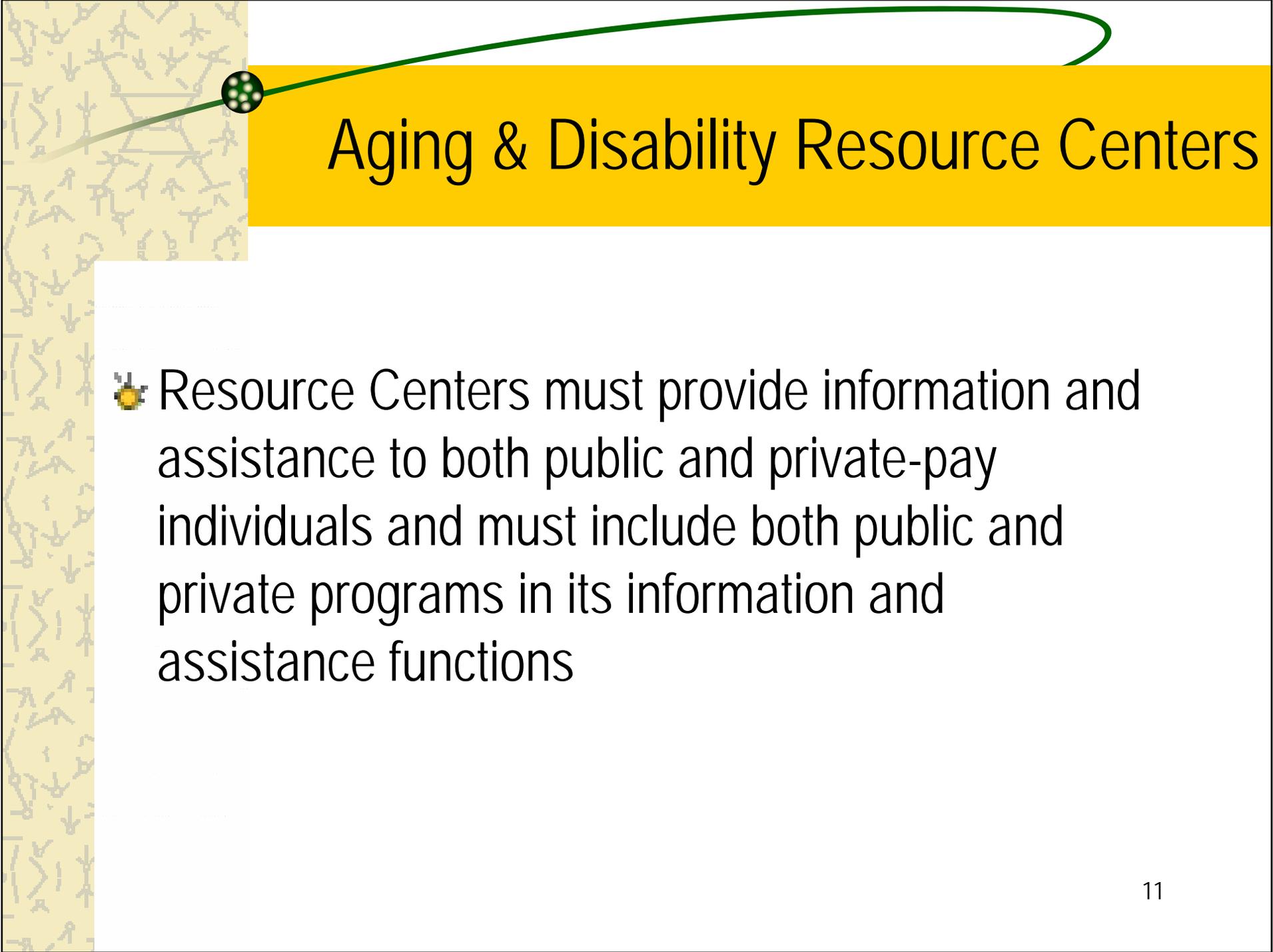
# Aging & Disability Resource Centers





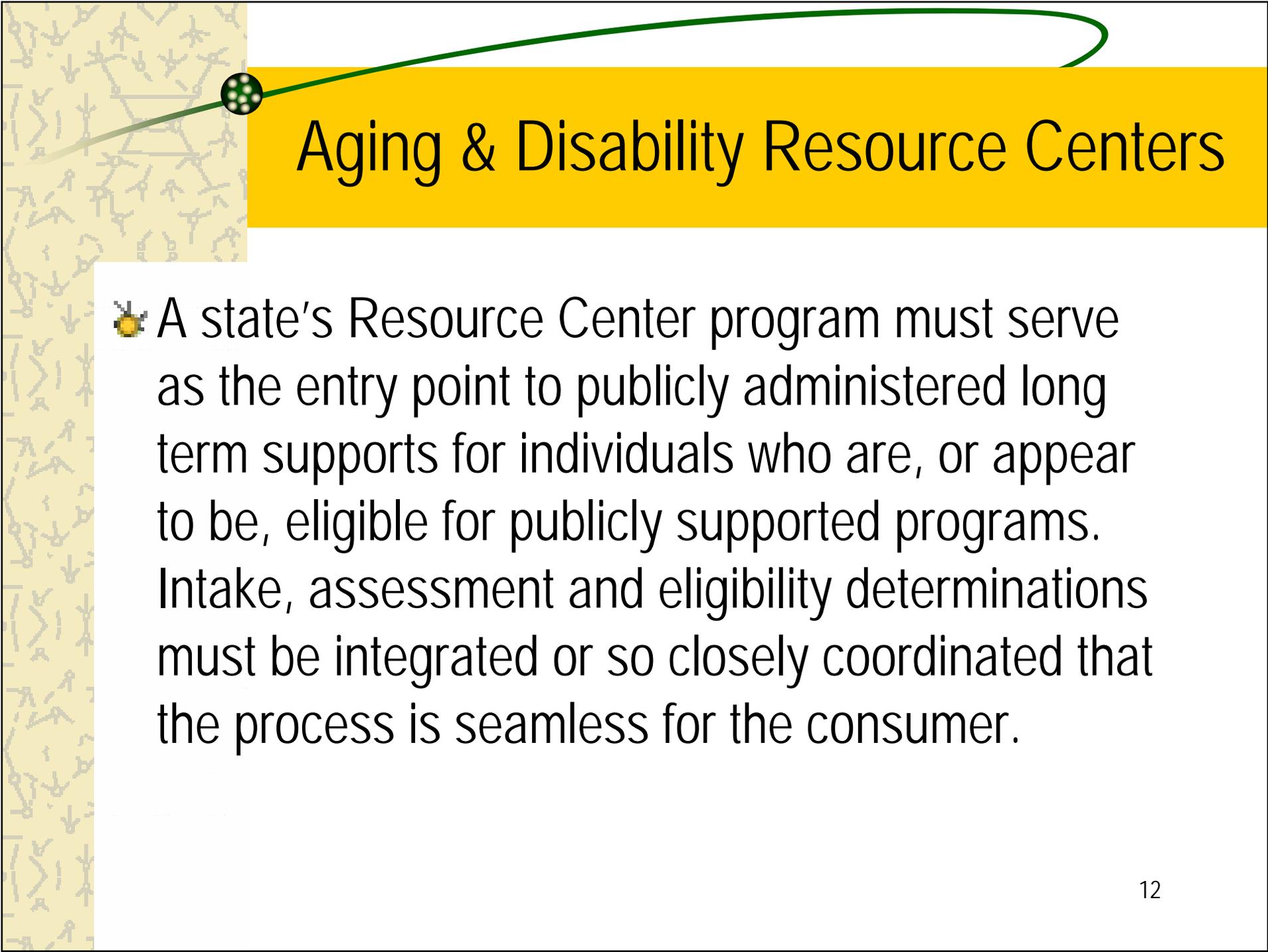
# Aging & Disability Resource Centers

- ✿ States must meaningfully involve stakeholders – including consumers – in the planning, implementation and evaluation of their Resource Center program



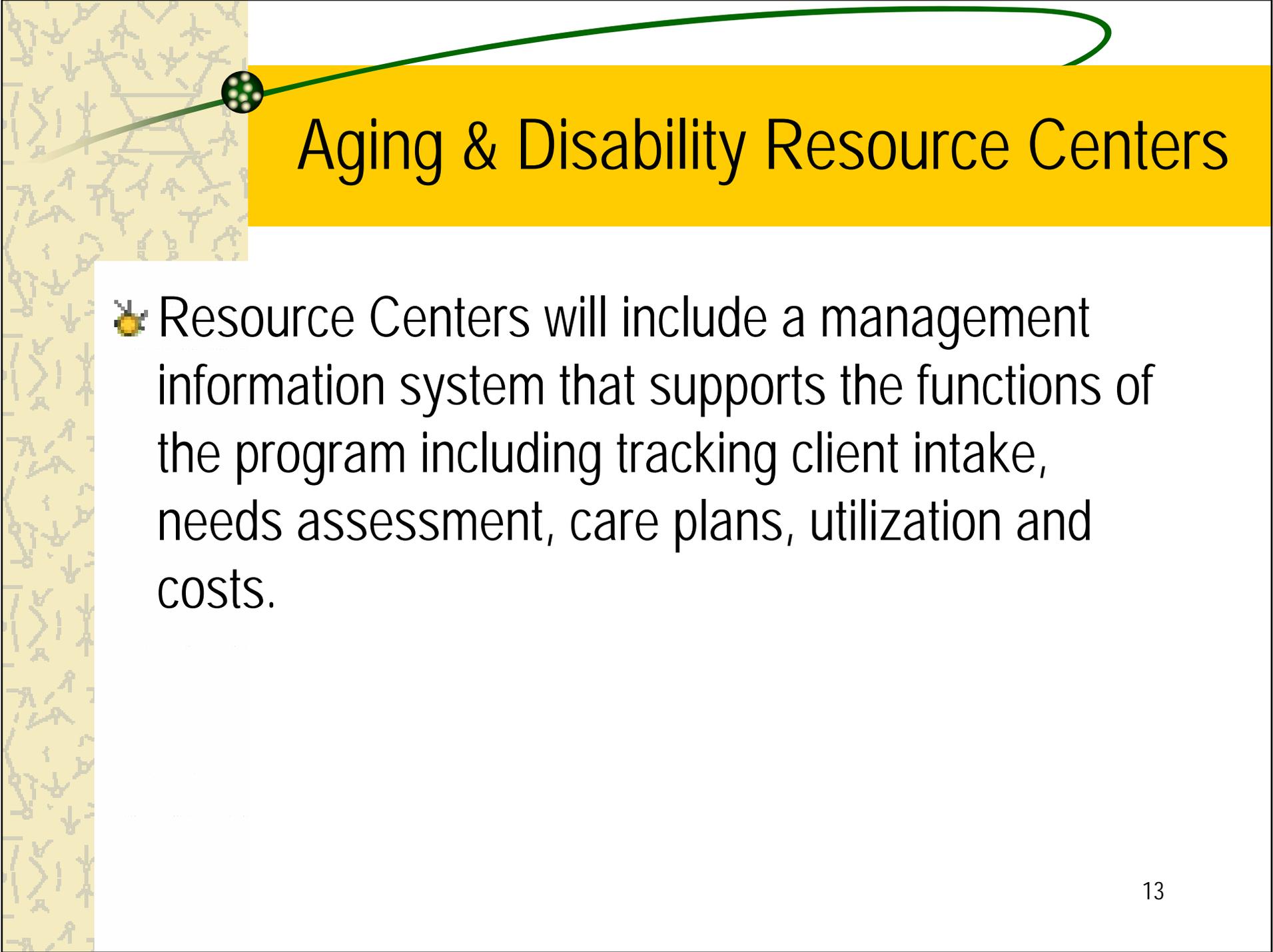
# Aging & Disability Resource Centers

- ❖ Resource Centers must provide information and assistance to both public and private-pay individuals and must include both public and private programs in its information and assistance functions



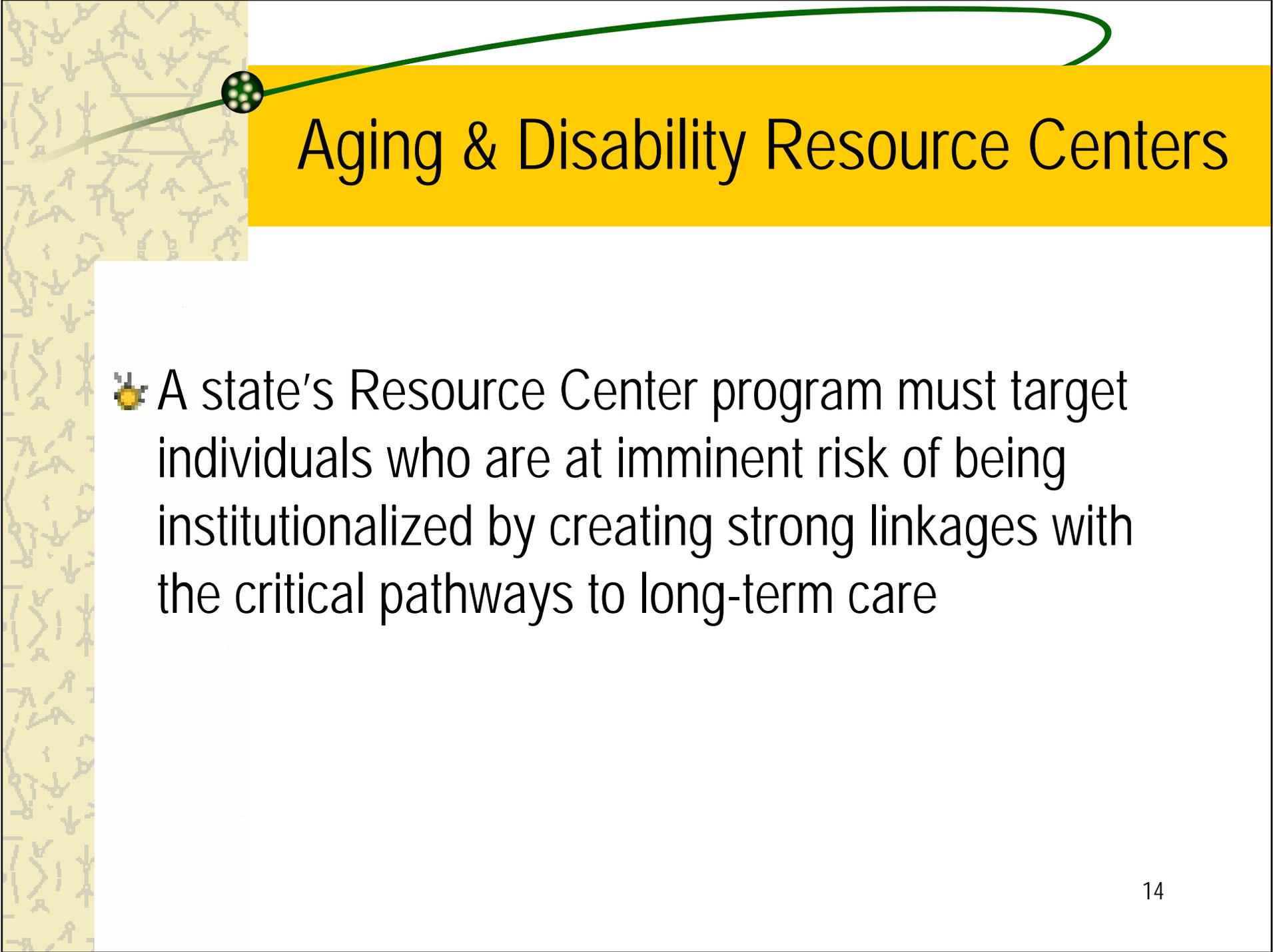
## Aging & Disability Resource Centers

- ✦ A state's Resource Center program must serve as the entry point to publicly administered long term supports for individuals who are, or appear to be, eligible for publicly supported programs. Intake, assessment and eligibility determinations must be integrated or so closely coordinated that the process is seamless for the consumer.



# Aging & Disability Resource Centers

- ✦ Resource Centers will include a management information system that supports the functions of the program including tracking client intake, needs assessment, care plans, utilization and costs.



# Aging & Disability Resource Centers

- ⚙️ A state's Resource Center program must target individuals who are at imminent risk of being institutionalized by creating strong linkages with the critical pathways to long-term care



# Aging & Disability Resource Centers

## ✿ Aging and Disability Resource Center Functions:

### – Awareness and Information

- Public Education
- Information on Long Term Support Options



# Aging & Disability Resource Centers

## Aging and Disability Resource Center Functions:

### – Assistance

- Long Term Support Options Counseling
- Benefits Counseling
- Employment Options Counseling
- Crisis Intervention
- Referral to other programs and benefits
- Assisting individuals to plan for their future long term support needs



# Aging & Disability Resource Centers

## ✦ Aging and Disability Resource Center Functions:

### – Access

- Eligibility Screening
- Assistance in accessing services paid with private funds
- Comprehensive Assessment
- Programmatic Eligibility Determination
- Medicaid Financial Eligibility Determination
- One-Stop Access to all public programs for community and institutional long term support services administered by the state under Medicaid, Older Americans Act and any other publicly funded services



# Aging & Disability Resource Centers

## Measurable Performance Goals

- Visibility
- Trust
- Ease of Access
- Responsiveness
- Efficiency
- Effectiveness



# Aging & Disability Resource Centers

## 🌟 2003 Program Grantees

Louisiana

Maine

Maryland

Massachusetts

Minnesota

Montana

New Hampshire

New Jersey

Pennsylvania

Rhode Island

South Carolina

West Virginia



# Aging & Disability Resource Centers

## 2004 Program Grantees

Alaska

Arkansas

California

CNMI

Florida

Georgia

Illinois

Indiana

Iowa

New Mexico

North Carolina

Wisconsin



# Aging & Disability Resource Centers

## ✦ Summary of Approaches

- Grantee agency is SUA in 22 of 24 states
- 7 states plan to have Resource Centers statewide by the end of Year 3
- At least 17 states plan using Information Technology for streamlining access through eligibility determinations
- Target Populations (all grantees will serve 60+)
  - All populations of people with disabilities – 7 states
  - Physical disabilities – 9 states
  - MR/DD – 2
  - MI – 1
  - Combination/undecided - 5
- Most ADRCs plan web-based I&R with consumer access



# Aging & Disability Resource Centers

## ADRC Technical Assistance

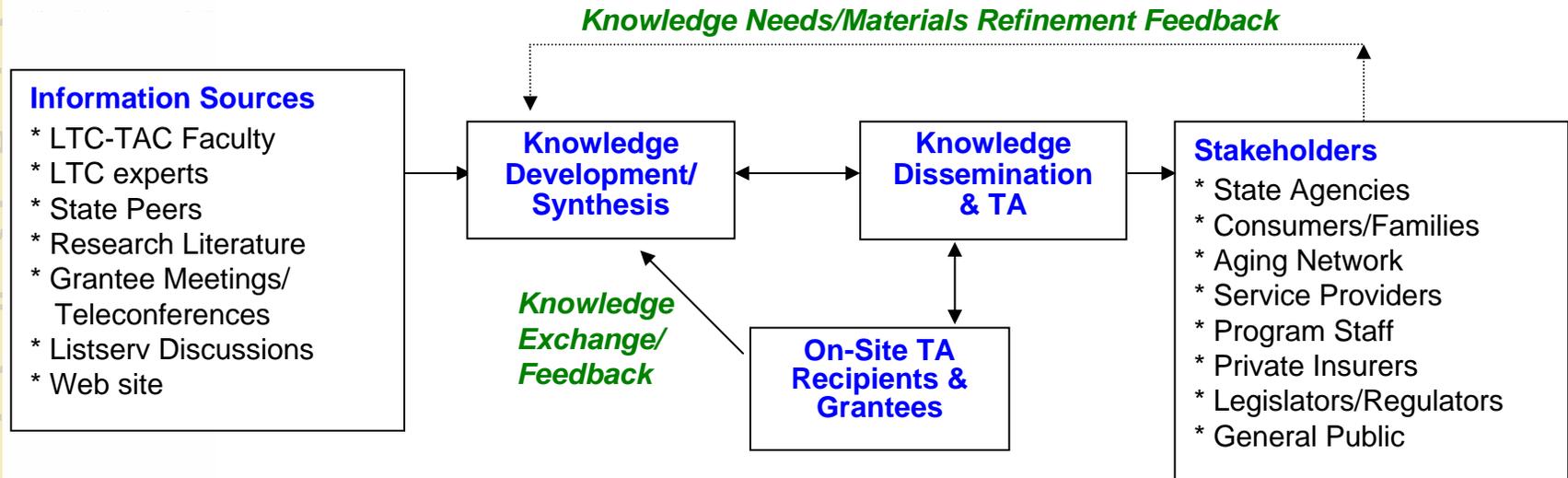
- ☀ The Lewin Group – ADRC Technical Assistance Exchange
  - Point of first contact for ADRC TA
- ☀ Community Living Exchange Collaborative
  - Rutgers Center for State Health Policy & National Academy for State Health Policy



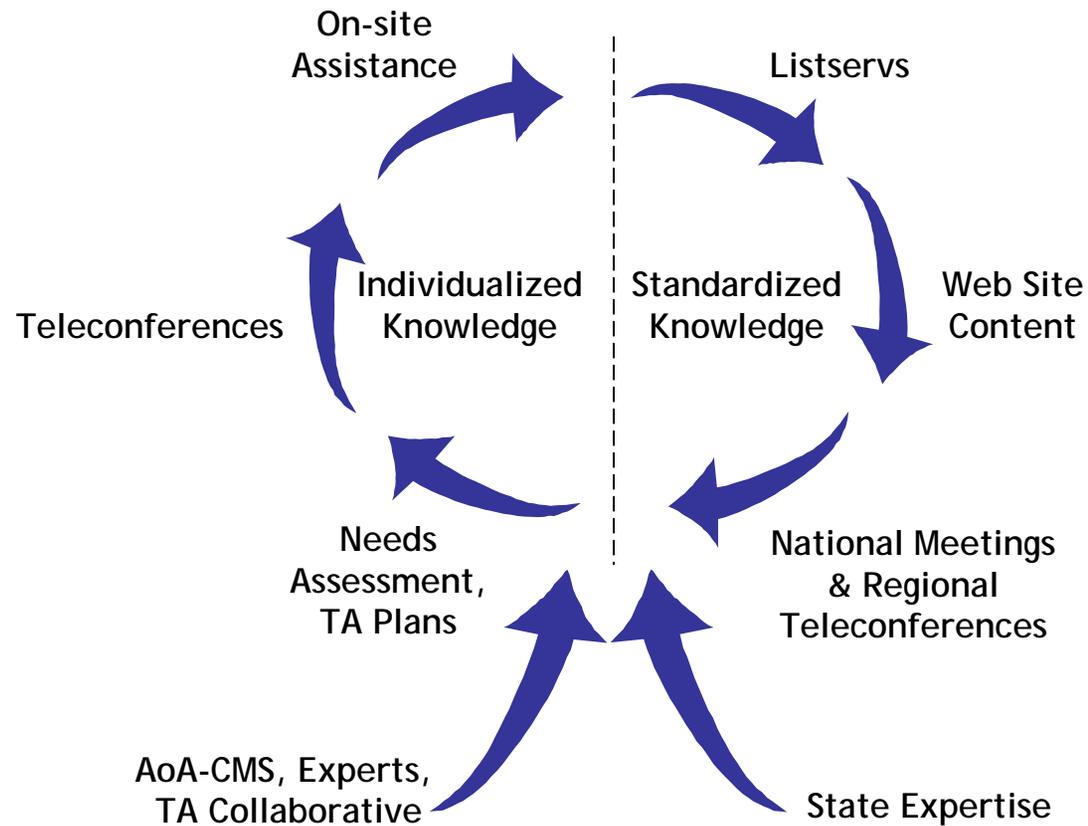
# Major Components/Requirements

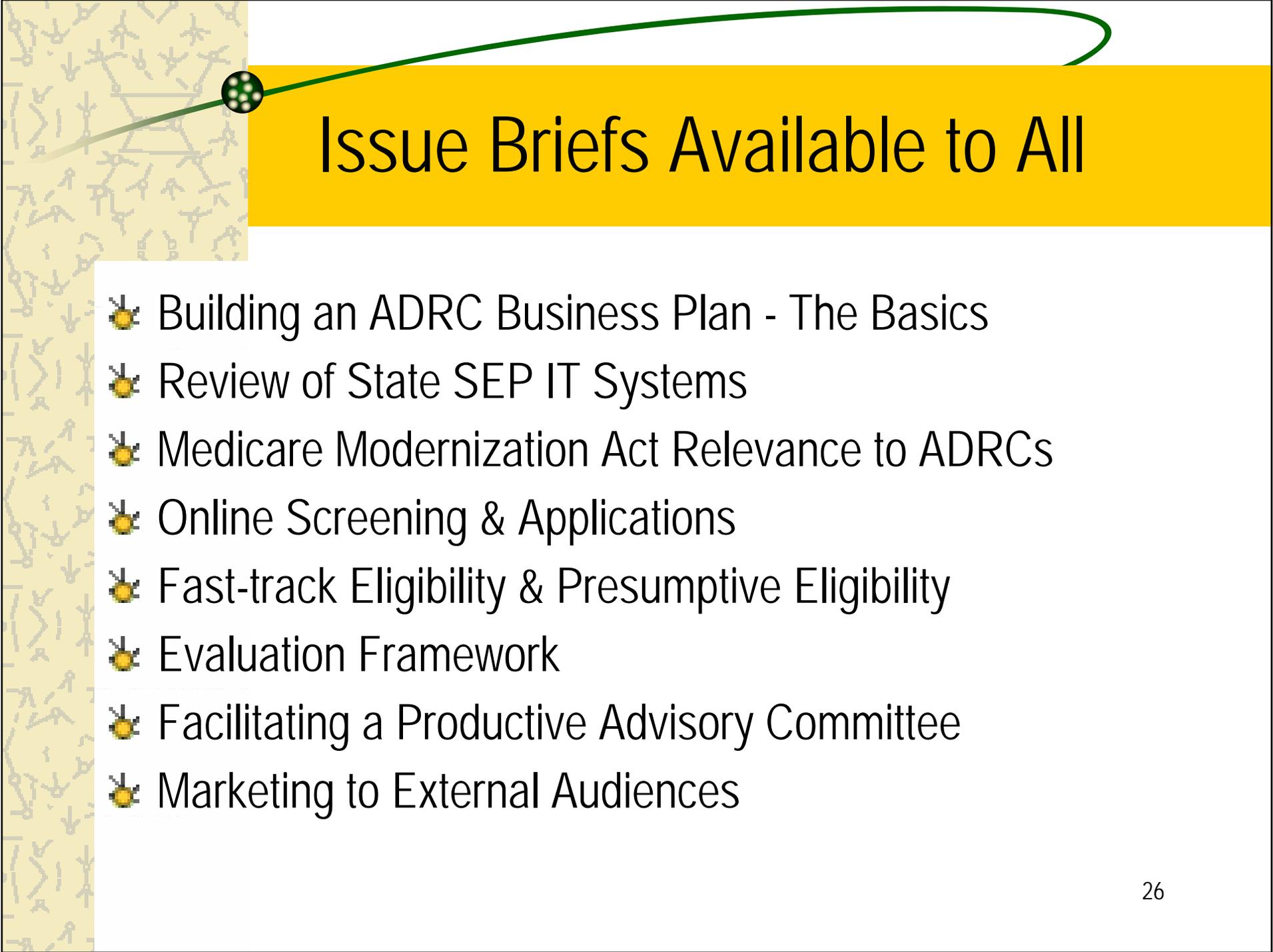
- ✿ ADRC Service Components
  - Program Eligibility
  - Private Pay
- ✿ Stakeholder Input & Partnerships
- ✿ Financing
- ✿ Business Operations
  - Critical Pathways
- ✿ IT & MIS
- ✿ Evaluation

# Knowledge Transfer Framework



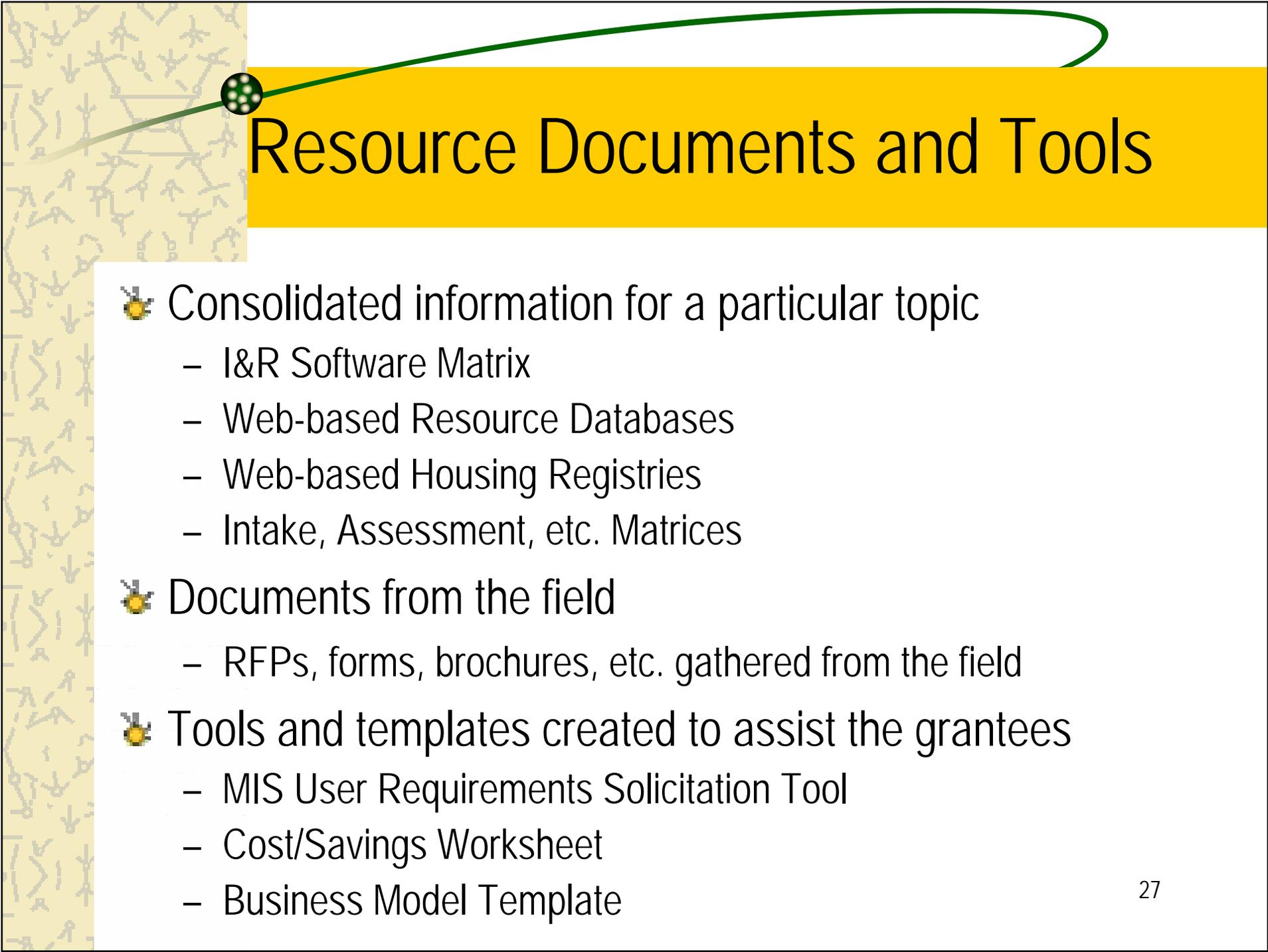
# Reinforced Learning Process





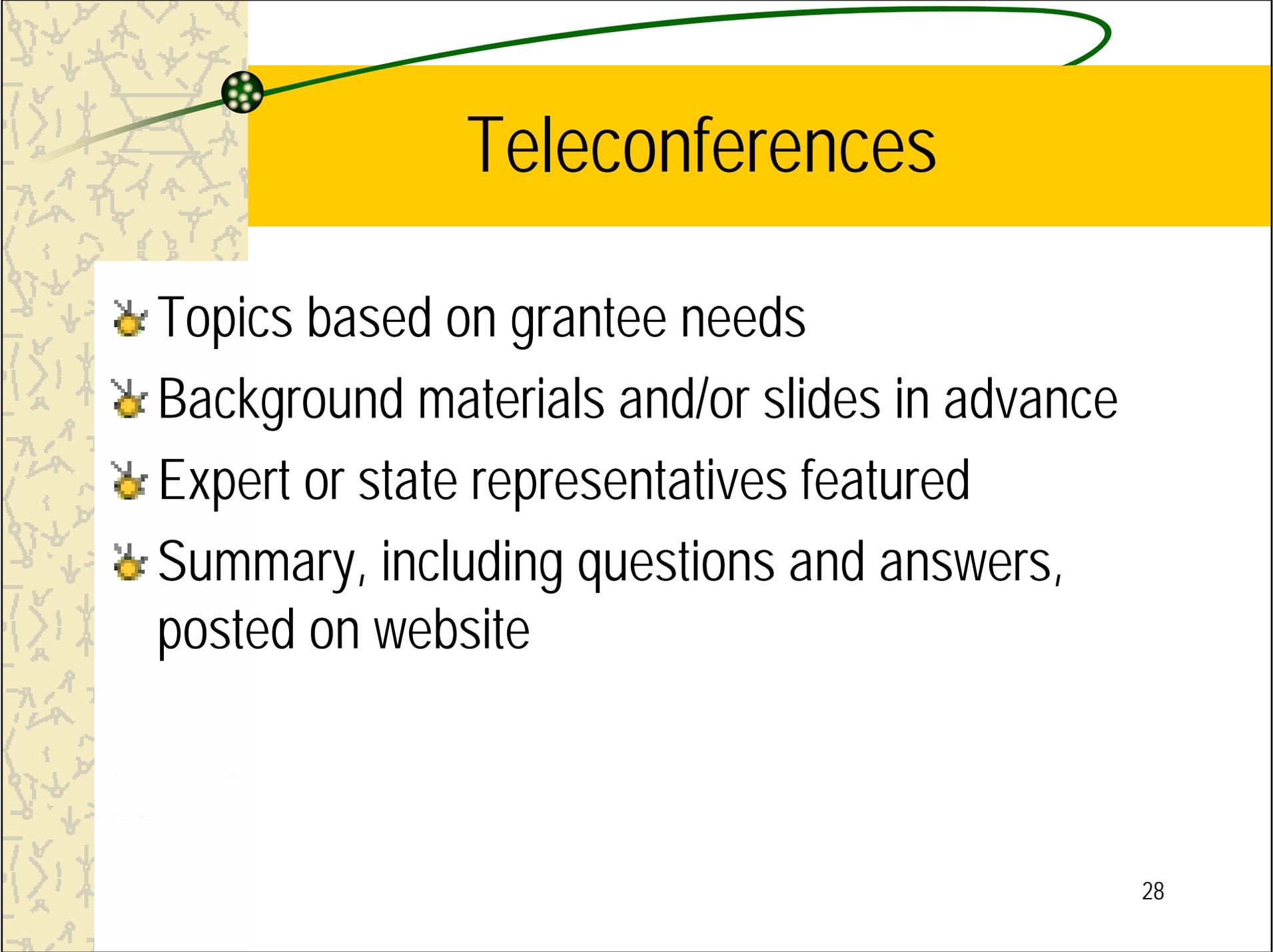
# Issue Briefs Available to All

- ✿ Building an ADRC Business Plan - The Basics
- ✿ Review of State SEP IT Systems
- ✿ Medicare Modernization Act Relevance to ADRCs
- ✿ Online Screening & Applications
- ✿ Fast-track Eligibility & Presumptive Eligibility
- ✿ Evaluation Framework
- ✿ Facilitating a Productive Advisory Committee
- ✿ Marketing to External Audiences



# Resource Documents and Tools

- ✦ Consolidated information for a particular topic
  - I&R Software Matrix
  - Web-based Resource Databases
  - Web-based Housing Registries
  - Intake, Assessment, etc. Matrices
- ✦ Documents from the field
  - RFPs, forms, brochures, etc. gathered from the field
- ✦ Tools and templates created to assist the grantees
  - MIS User Requirements Solicitation Tool
  - Cost/Savings Worksheet
  - Business Model Template



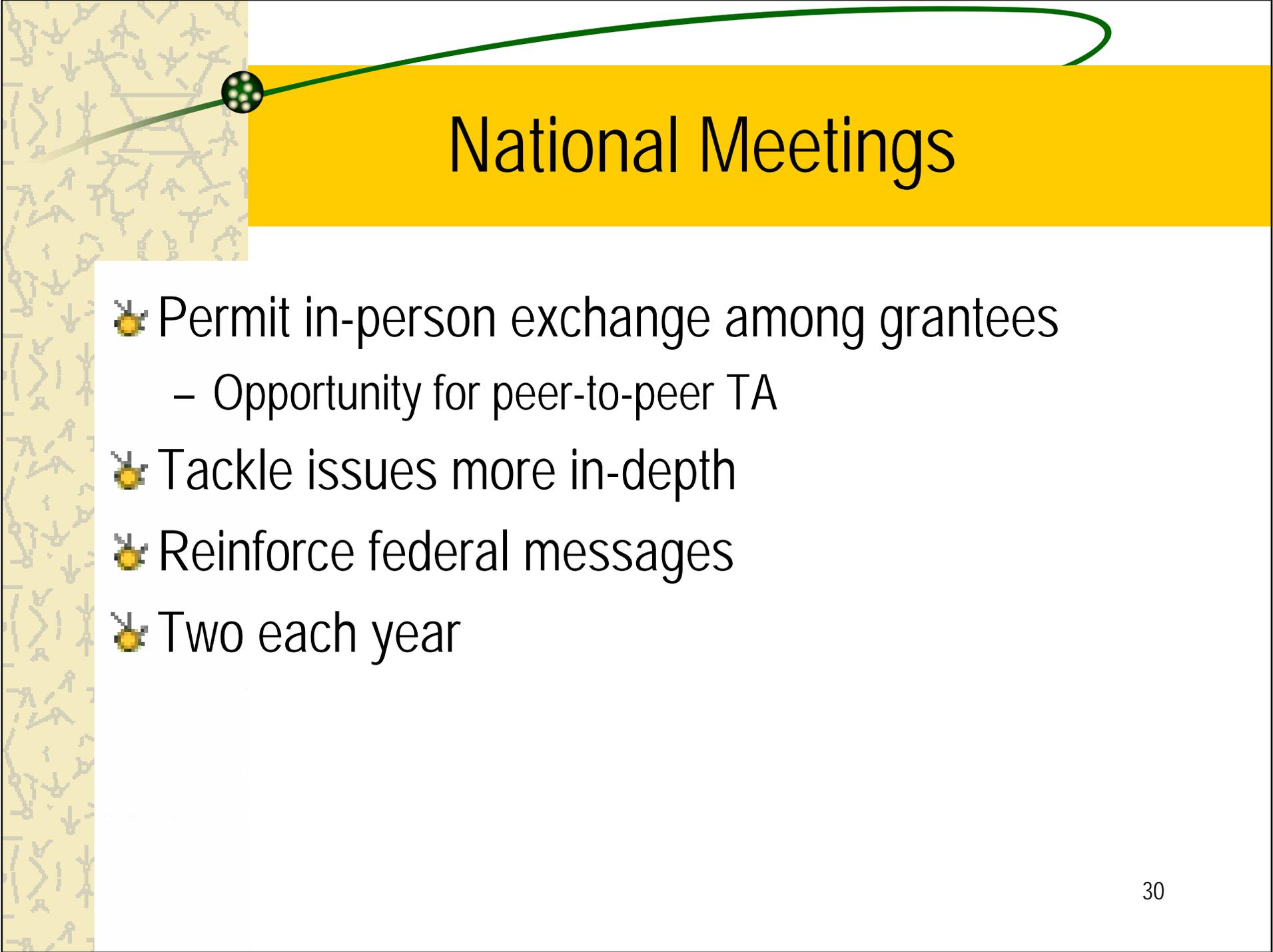
# Teleconferences

- ✦ Topics based on grantee needs
- ✦ Background materials and/or slides in advance
- ✦ Expert or state representatives featured
- ✦ Summary, including questions and answers, posted on website



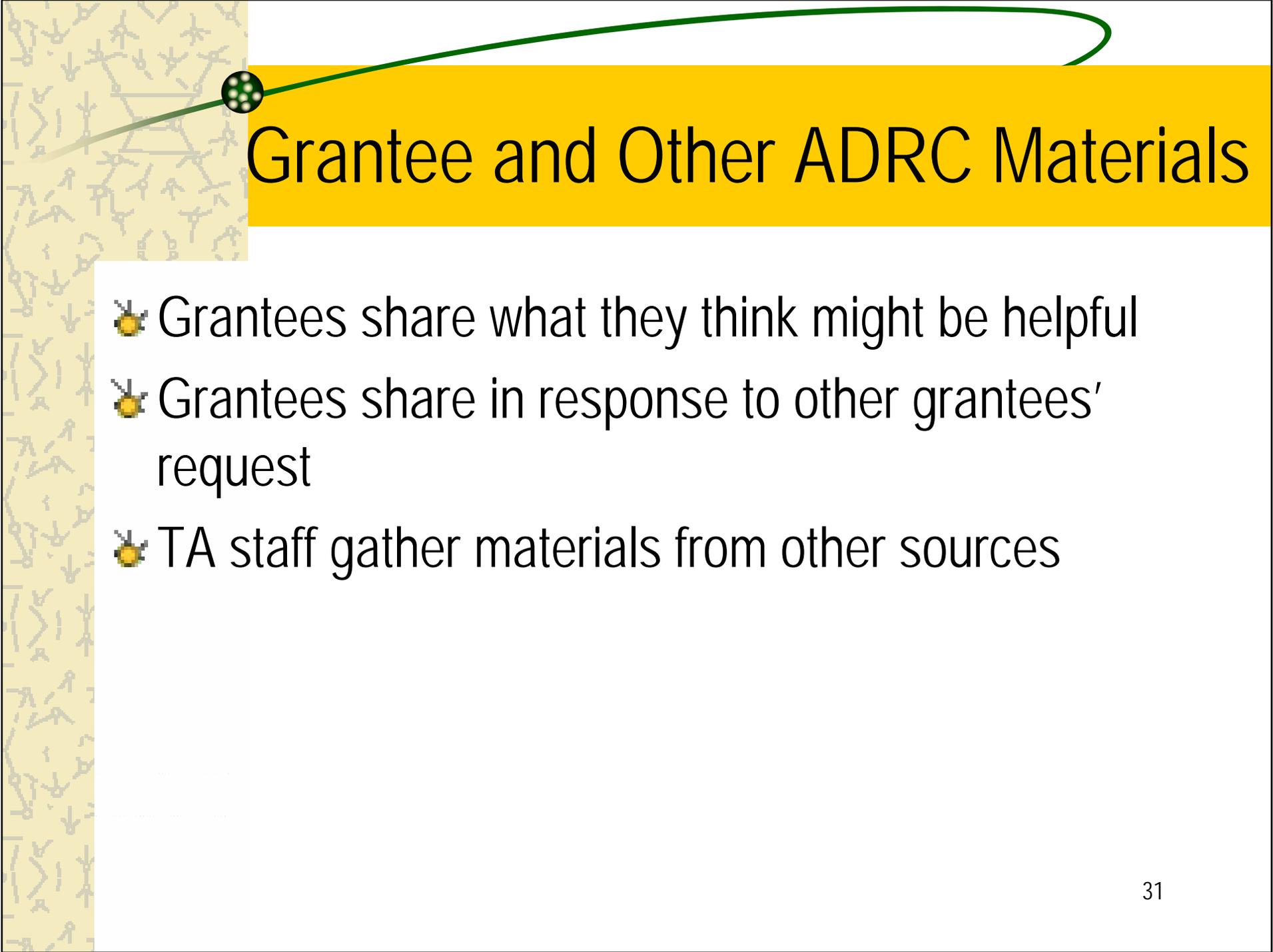
# On-Site Technical Assistance

- ✦ Support grantees with other stakeholders
- ✦ Facilitate meetings
- ✦ Individualized TA needs



# National Meetings

- ✦ Permit in-person exchange among grantees
  - Opportunity for peer-to-peer TA
- ✦ Tackle issues more in-depth
- ✦ Reinforce federal messages
- ✦ Two each year



# Grantee and Other ADRC Materials

- ✦ Grantees share what they think might be helpful
- ✦ Grantees share in response to other grantees' request
- ✦ TA staff gather materials from other sources



# Record Activities and Progress

- ✦ Developed TA Tracking Tool
- ✦ Organized around key work plan activities
- ✦ Capture baseline and progress
- ✦ Record all requests and responses



# Website – ADRC-TAE.org

- ✿ Primary Mechanism to Disseminate & Exchange Info.
  - Online Discussions
  - Calendar of Events
  - Background materials for upcoming TA events
  - Summaries of past TA events
  - Surveys of grantees
  - Materials grantees want to share
  - TA Tracking Tool Reports
- ✿ Hope to Build a Grantee Online Community

# ADRC-TAE.org Public Portion



Resources by Topic ▾ TAE Products ▾ About ADRCs ▾

## What is the Aging & Disability Resource Center Program?

The Aging and Disability Resource Center (ADRC) grant program is intended to stimulate the development of state systems that integrate information and referral, benefits and options counseling services as well as facilitating access to publicly and privately financed long term care (LTC) services and benefits. The twelve ADRC projects will serve older adults and individuals with disabilities. The program is jointly sponsored by the federal [Administration on Aging \(AoA\)](#) and the [Centers for Medicare and Medicaid Services \(CMS\)](#), both part of the U.S. Department of Health and Human Services. ADRC also is part of the President's Long Term Care Re-balancing Initiative and [New Freedom Initiative](#).

## What is the Technical Assistance Exchange?

The ADRC Technical Assistance Exchange is funded by AOA and operated in partnership with CMS via its technical assistance center for the Real Choice grantees, the Community Living Exchange Collaborative: a National Technical Assistance Program. Housed at [The Lewin Group](#), the ADRC TA Exchange provides a forum for state-to-state information exchange on policy and program infrastructure development, and direct technical assistance to and between the states as they develop their ADRC projects and seek to enhance their information, referral and support services for seniors, persons with disabilities, and their families as they evaluate their LTC service options.

## Login

user:

Password:

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## Featured links

[AoA Home Page](#)  
[CMS Home Page](#)  
[The Lewin Group](#)  
[HCBS.org](#)  
[New Freedom Initiative](#)  
[National Association of State Units on Aging](#)  
[Community Partnerships for Older Adults](#)

# ADRC-TAE.org Public Portion

**Aging & Disability Resource Centers**  
Supported by the Administration on Aging and the Centers for Medicare & Medicaid Services

**Technical Assistance Exchange**

**Resources by Topic** ▾ **TAE Products** ▾ **About ADRCs** ▾

- ADRC Service Components
- Stakeholder Input & Partnerships
- Financing
- Business Operations
- IT & MIS
- Evaluation

- Outreach & Marketing
- Information & Referral
- Counseling: Benefits, LTC Options, Employment
- Eligibility
- Case Management
- Target Populations

**What is the Technical Assistance Exchange?**

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http://adrctae.org/tiki-page.php?pageName=ADRC+Service+Components-Public

# ADRC-TAE.org Public Portion

**Aging & Disability Resource Centers**  
Supported by  
the Administration on Aging and  
the Centers for Medicare & Medicaid Services

**Technical Assistance Exchange**

Resources by Topic ▾ TAE Products ▾ About ADRCs ▾

## ADRC SERVICE COMPONENTS: What are ADRC service delivery strategies?

Select one of the ADRC Service Component sub-topics listed below to skip to the relevant section:

- [Outreach & Marketing](#)
- [Information & Referral](#)
- [Counseling: Benefits, LTC Options, Employment](#)
- [Eligibility](#)
- [Case Management](#)

### Outreach & Marketing

Navigation Directions: Select the resource title or alternative format title to link directly to the resource. Offsite links will open a new browser window.

[TAE Issue Brief: Marketing to External Audiences \(PDF\)](#)  
**The Lewin Group, ADRC-TAE**  
The twofold purpose of this brief is to familiarize grantees with the principles of social marketing; and to provide a brief overview of the key steps involved in developing and implementing a social marketing campaign.  
*Added Jun-01-2004*

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#### Featured links

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- HCBS.org
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- Community Partnerships for Older Adults

# ADRC-TAE.org Public Portion

## Eligibility

Navigation Directions: Select the resource title or alternative format title to link directly to the resource. Offsite links will open a new browser window.

### [Assessment Tools Matrix \(PDF\)](#)

**The Lewin Group & AoA, ADRC-TAE**

Overview of selected assessment tools used by aging and other human service agencies. Contains descriptions of informational elements, format, targeted populations and staff training.

*Added Jun-07-2004*

### [Transitional Tools Matrix \(PDF\)](#)

**The Lewin Group & AoA, ADRC-TAE**

Overview of selected transitional tools used by aging and other human service agencies. Contains descriptions of informational elements, format, targeted populations and staff training.

*Added Jun-03-2004*

### [TAE Issue Brief: Online Screening and Applications \(PDF\)](#) or [\(HTML\)](#)

**The Lewin Group, ADRC-TAE**

Describes how different states have designed and implemented online applications for assessing and determining eligibility for health and social service programs.

*Added Feb-04-2004*

### [Pennsylvania's Streamlined Eligibility Conference Call Summary - April 1, 2004 \(PDF\)](#)

**The Lewin Group, ADRC-TAE**

Notes from the TAE Monthly Grantee Teleconference on Pennsylvania's Streamlined Eligibility that was held on April 1, 2004.

*Added Apr-13-2004*

### [Home and Community-Based Services Elimination Work Group \(PDF\)](#)

**Pennsylvania**

Report produced by Pennsylvania Council on Long Term Care outlining procedural, informational and systemic barriers to home and community-based services.

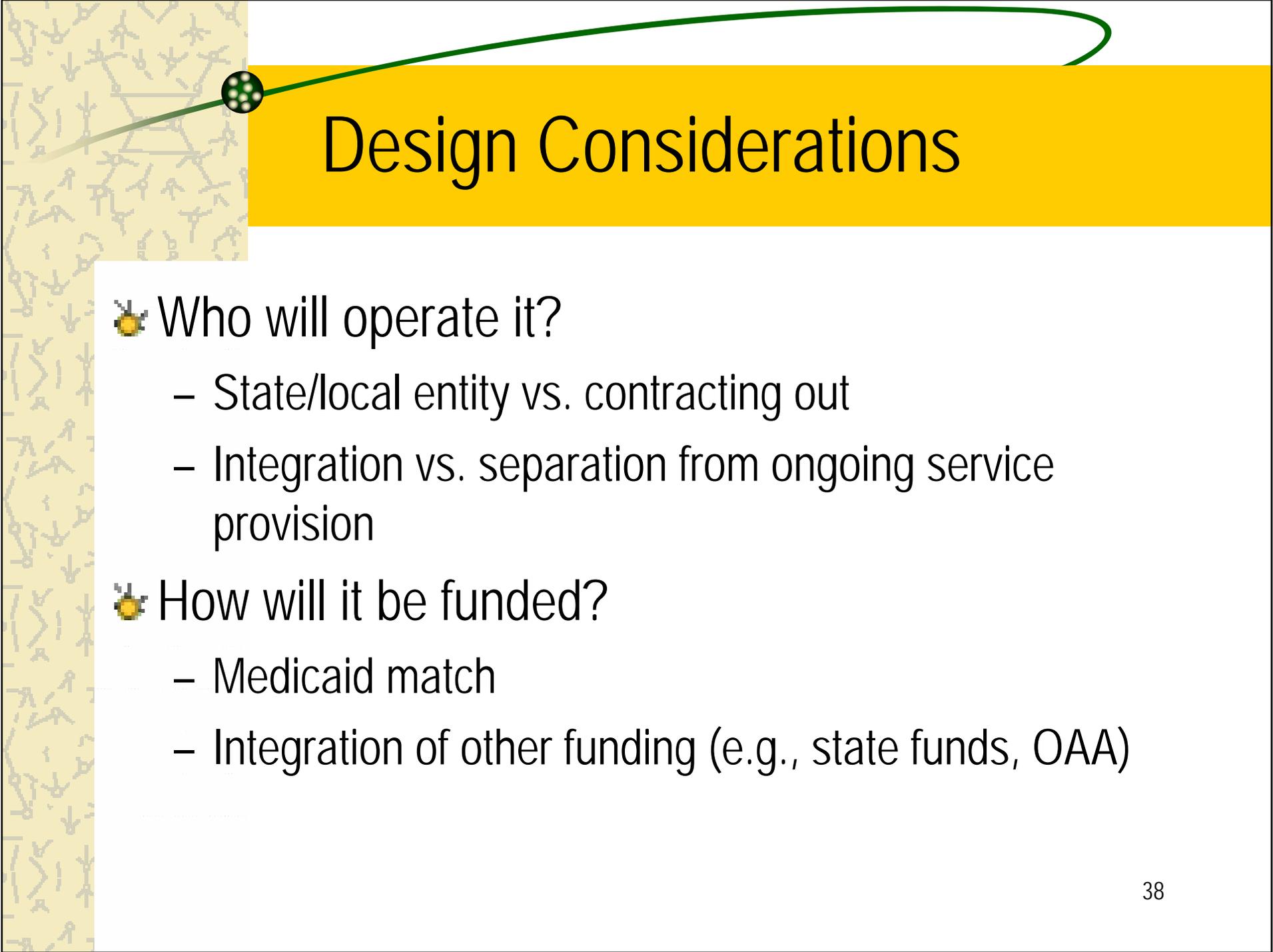
*Added Apr-10-2004*

### [Community Choice Assessment Instrument \(PDF\)](#)

**Pennsylvania**

Streamlined instrument used by Pennsylvania's Community Choice program to determine functional eligibility for long term supports and services.

*Added May-06-2004*



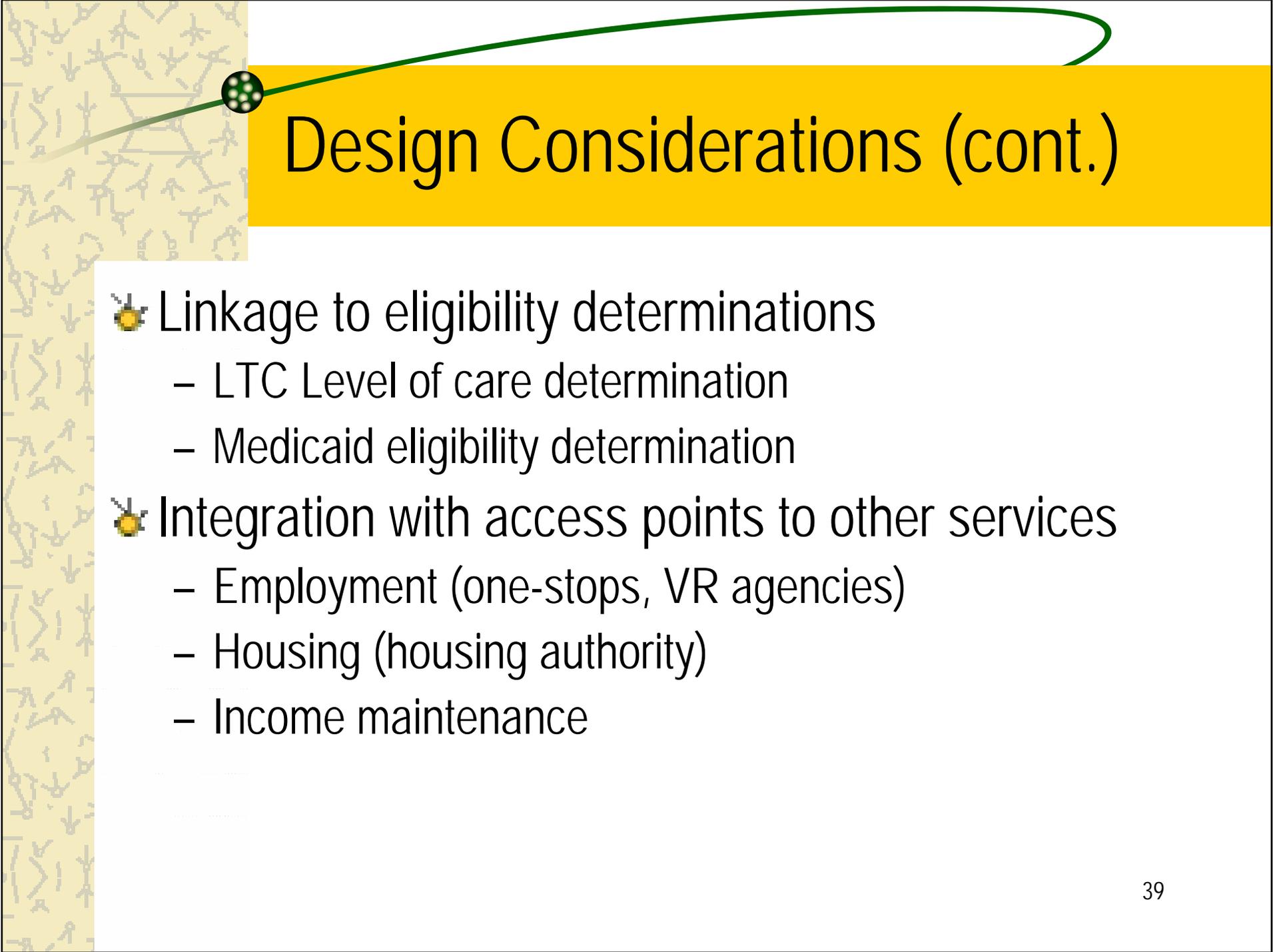
# Design Considerations

## ✦ Who will operate it?

- State/local entity vs. contracting out
- Integration vs. separation from ongoing service provision

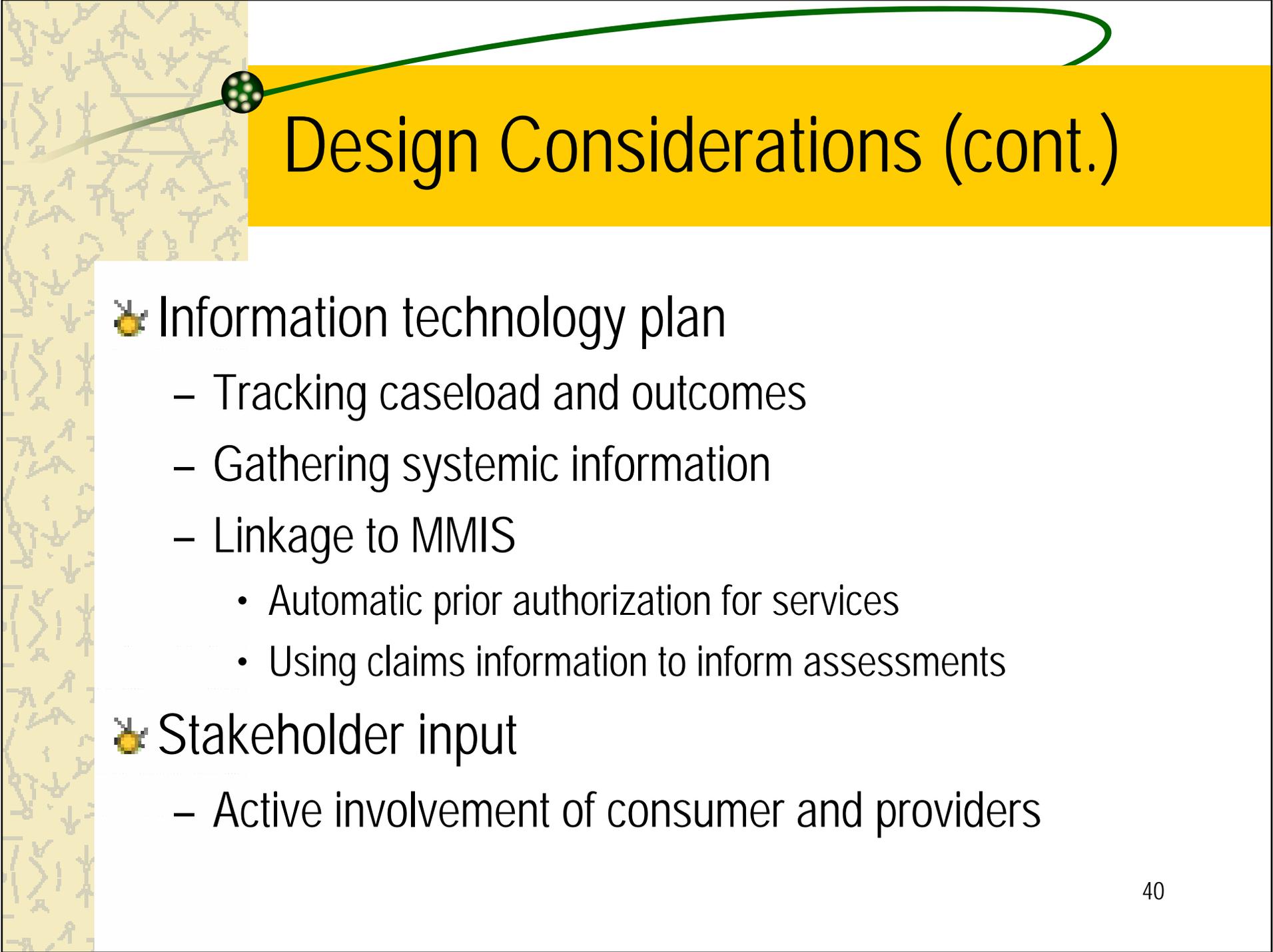
## ✦ How will it be funded?

- Medicaid match
- Integration of other funding (e.g., state funds, OAA)



## Design Considerations (cont.)

- ✦ Linkage to eligibility determinations
  - LTC Level of care determination
  - Medicaid eligibility determination
- ✦ Integration with access points to other services
  - Employment (one-stops, VR agencies)
  - Housing (housing authority)
  - Income maintenance



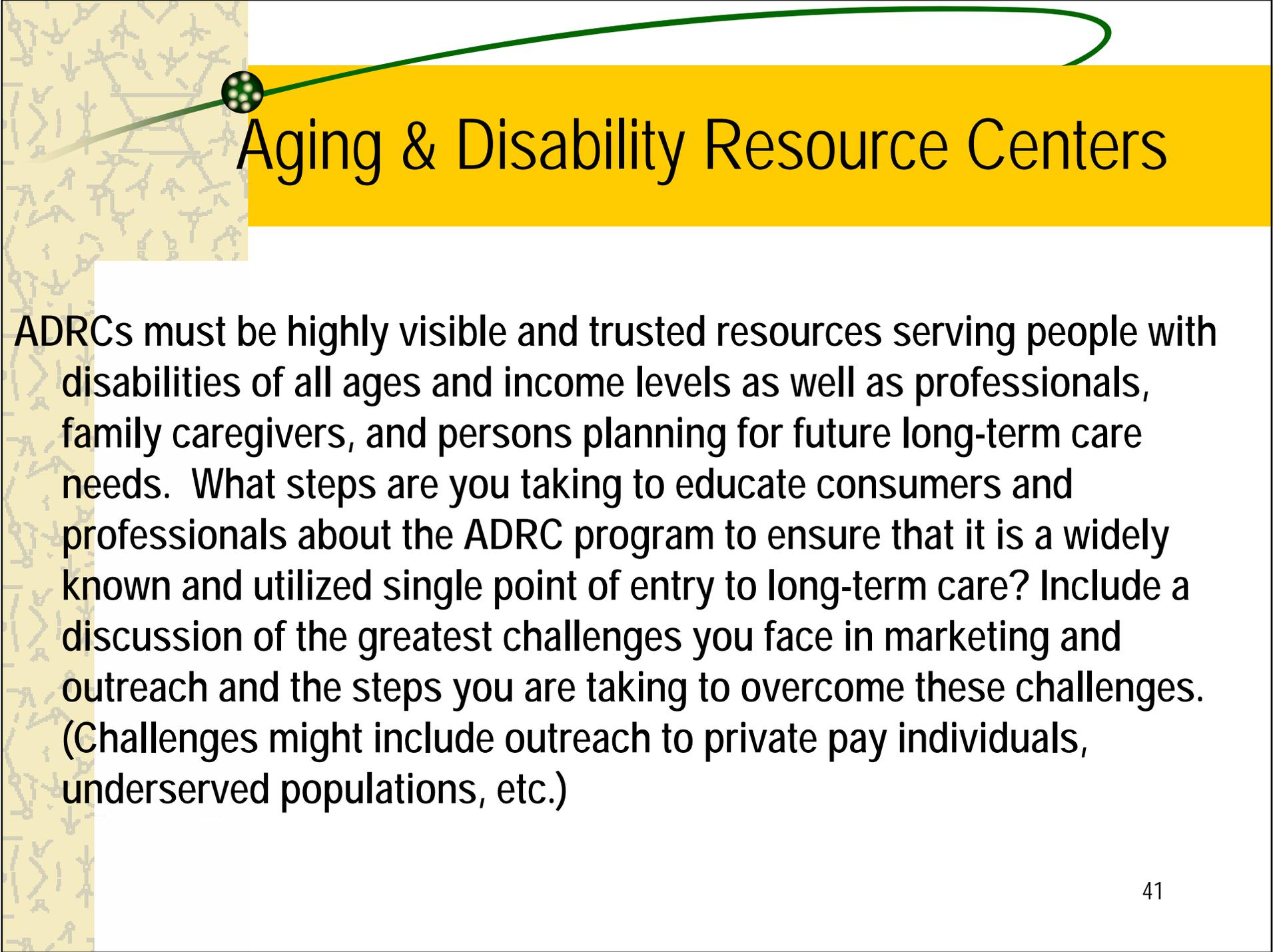
## Design Considerations (cont.)

### ✦ Information technology plan

- Tracking caseload and outcomes
- Gathering systemic information
- Linkage to MMIS
  - Automatic prior authorization for services
  - Using claims information to inform assessments

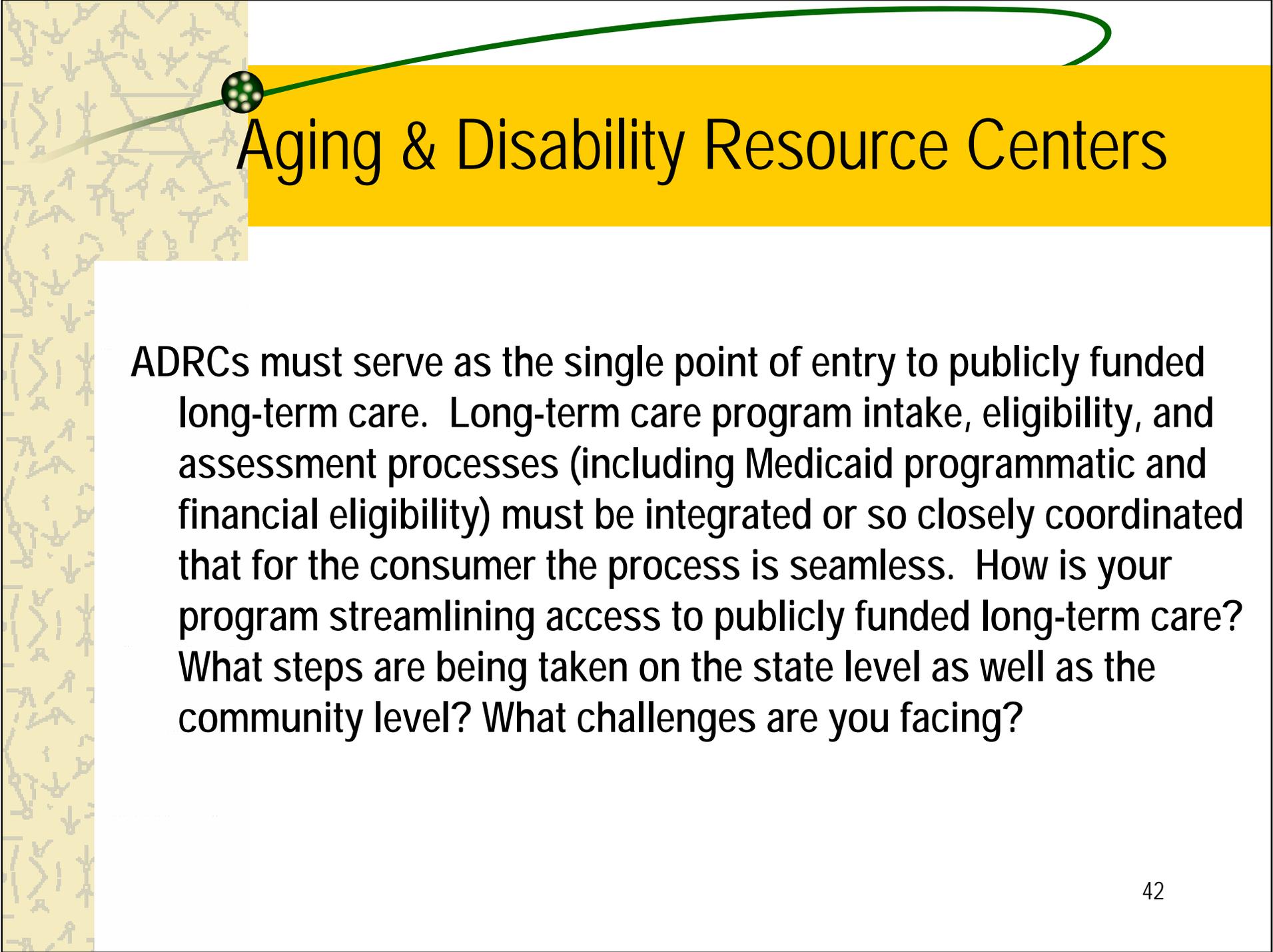
### ✦ Stakeholder input

- Active involvement of consumer and providers



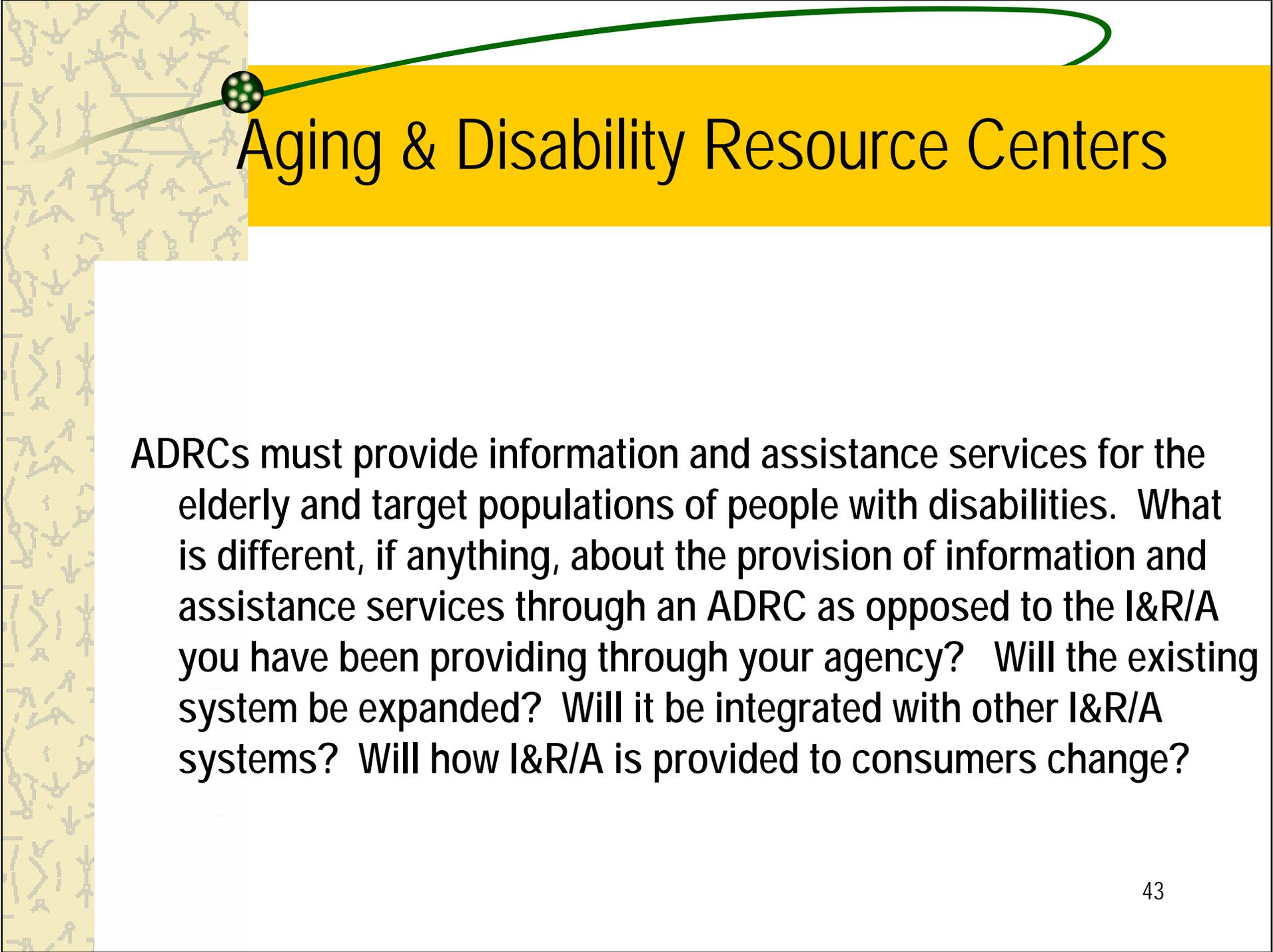
# Aging & Disability Resource Centers

ADRCs must be highly visible and trusted resources serving people with disabilities of all ages and income levels as well as professionals, family caregivers, and persons planning for future long-term care needs. What steps are you taking to educate consumers and professionals about the ADRC program to ensure that it is a widely known and utilized single point of entry to long-term care? Include a discussion of the greatest challenges you face in marketing and outreach and the steps you are taking to overcome these challenges. (Challenges might include outreach to private pay individuals, underserved populations, etc.)



# Aging & Disability Resource Centers

ADRCs must serve as the single point of entry to publicly funded long-term care. Long-term care program intake, eligibility, and assessment processes (including Medicaid programmatic and financial eligibility) must be integrated or so closely coordinated that for the consumer the process is seamless. How is your program streamlining access to publicly funded long-term care? What steps are being taken on the state level as well as the community level? What challenges are you facing?



# Aging & Disability Resource Centers

ADRCs must provide information and assistance services for the elderly and target populations of people with disabilities. What is different, if anything, about the provision of information and assistance services through an ADRC as opposed to the I&R/A you have been providing through your agency? Will the existing system be expanded? Will it be integrated with other I&R/A systems? Will how I&R/A is provided to consumers change?