



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

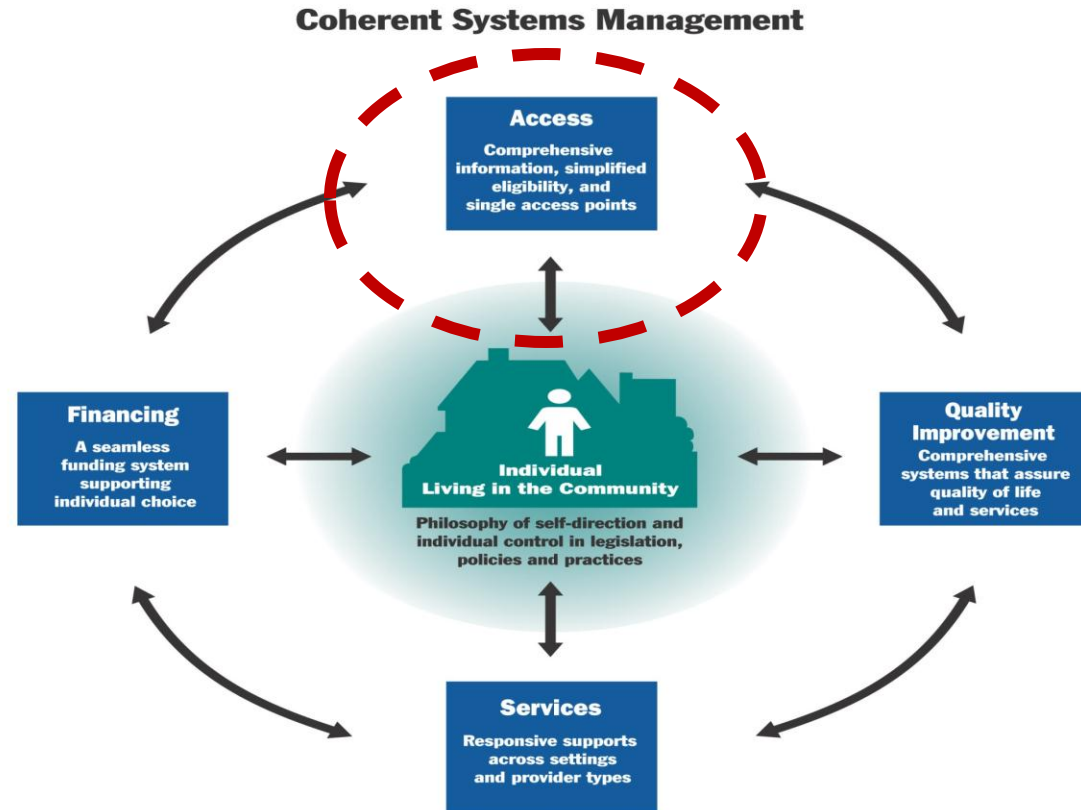
- We each bring our own perspective on what is I&R or Options Counseling
- Start Fresh – Try not to judge too quickly
- What you have seen or heard might not be the whole story....

Aging & Disability Resource Center

Systems Change Vision

“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.

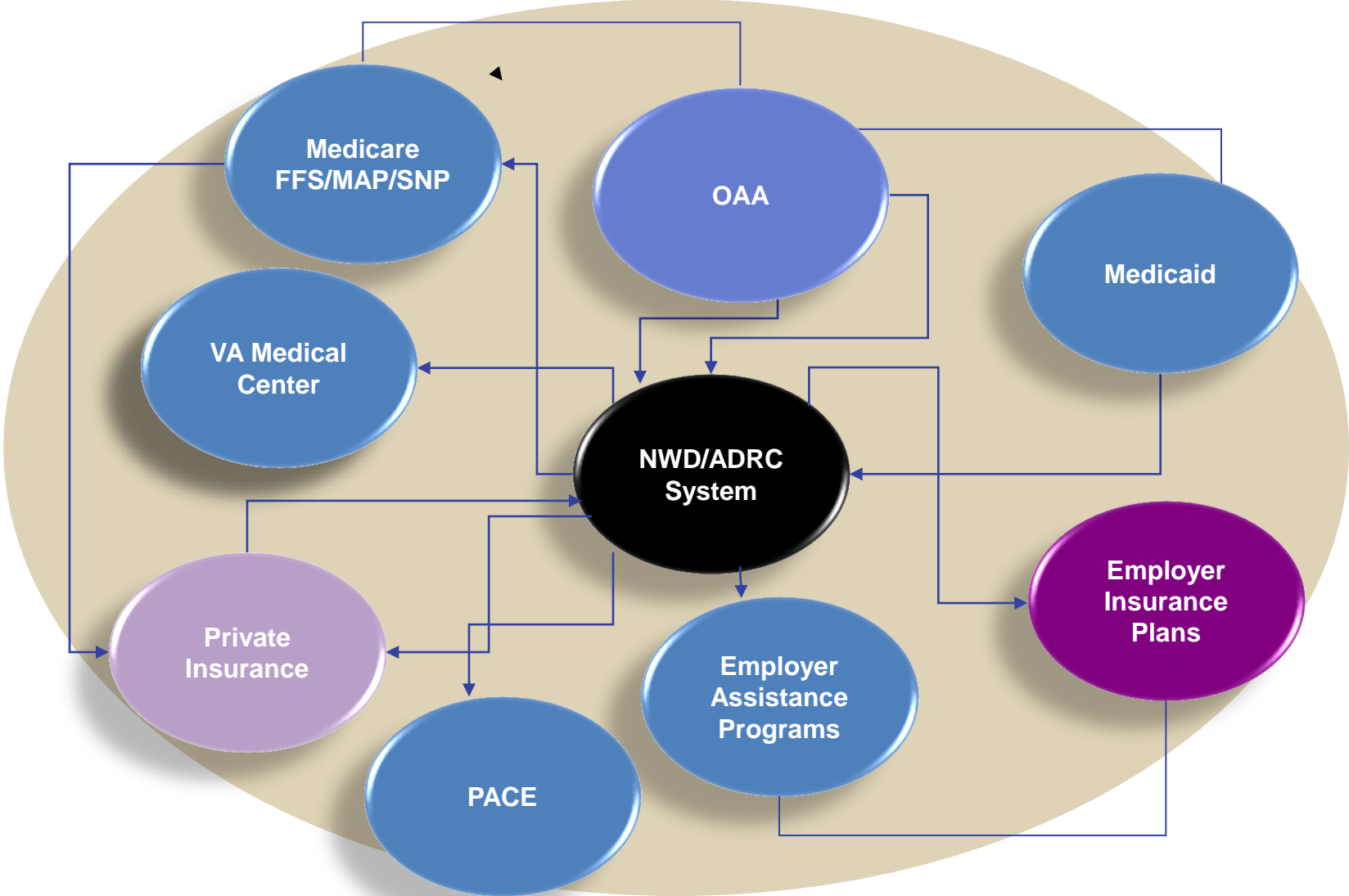


Susan C. Reinhard, Enid Kassner, Ari Houser, and Robert Mollica

September 2011

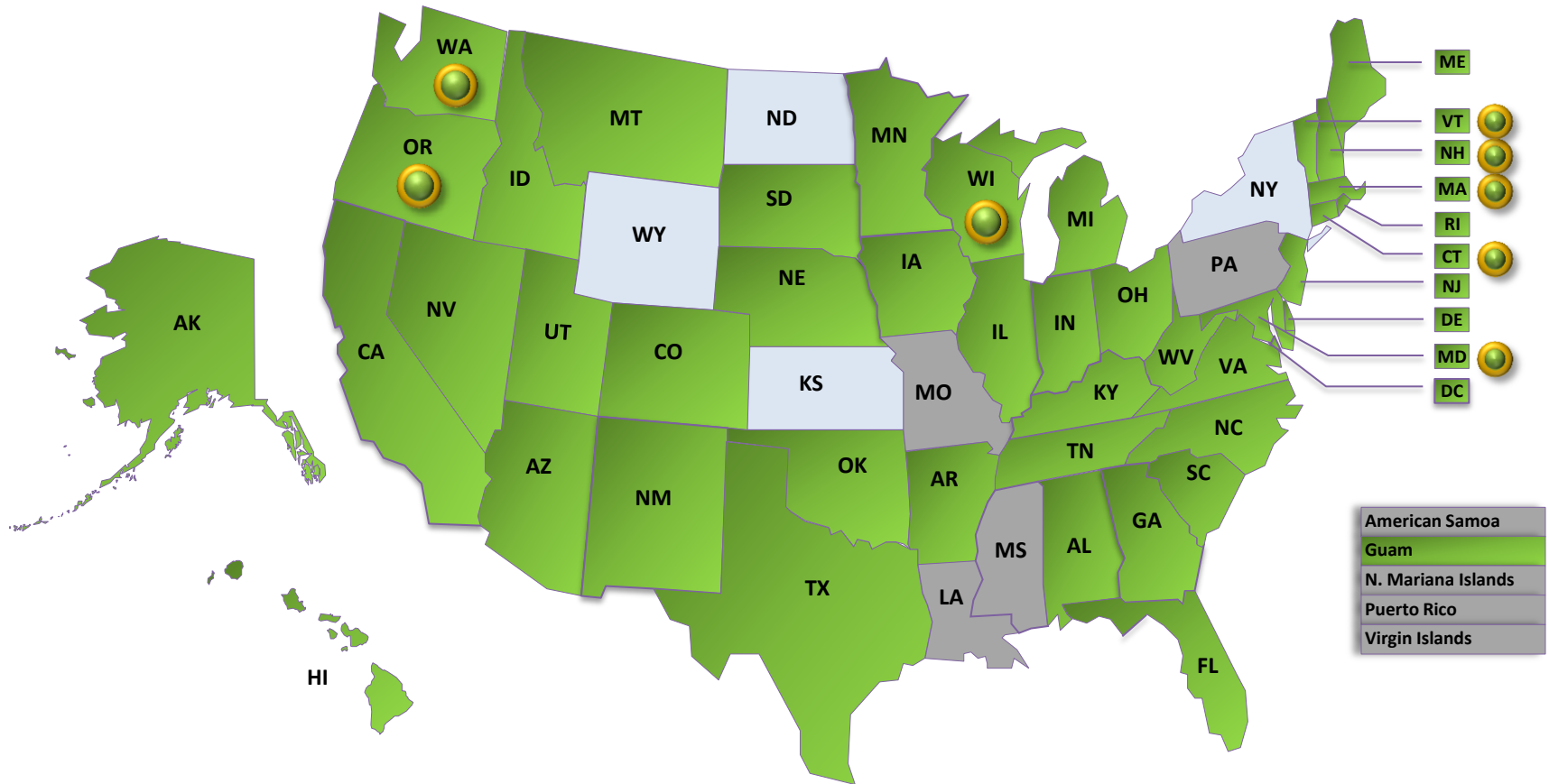
<http://www.longtermscorecard.org/>





Community Scan – Potential Buyers



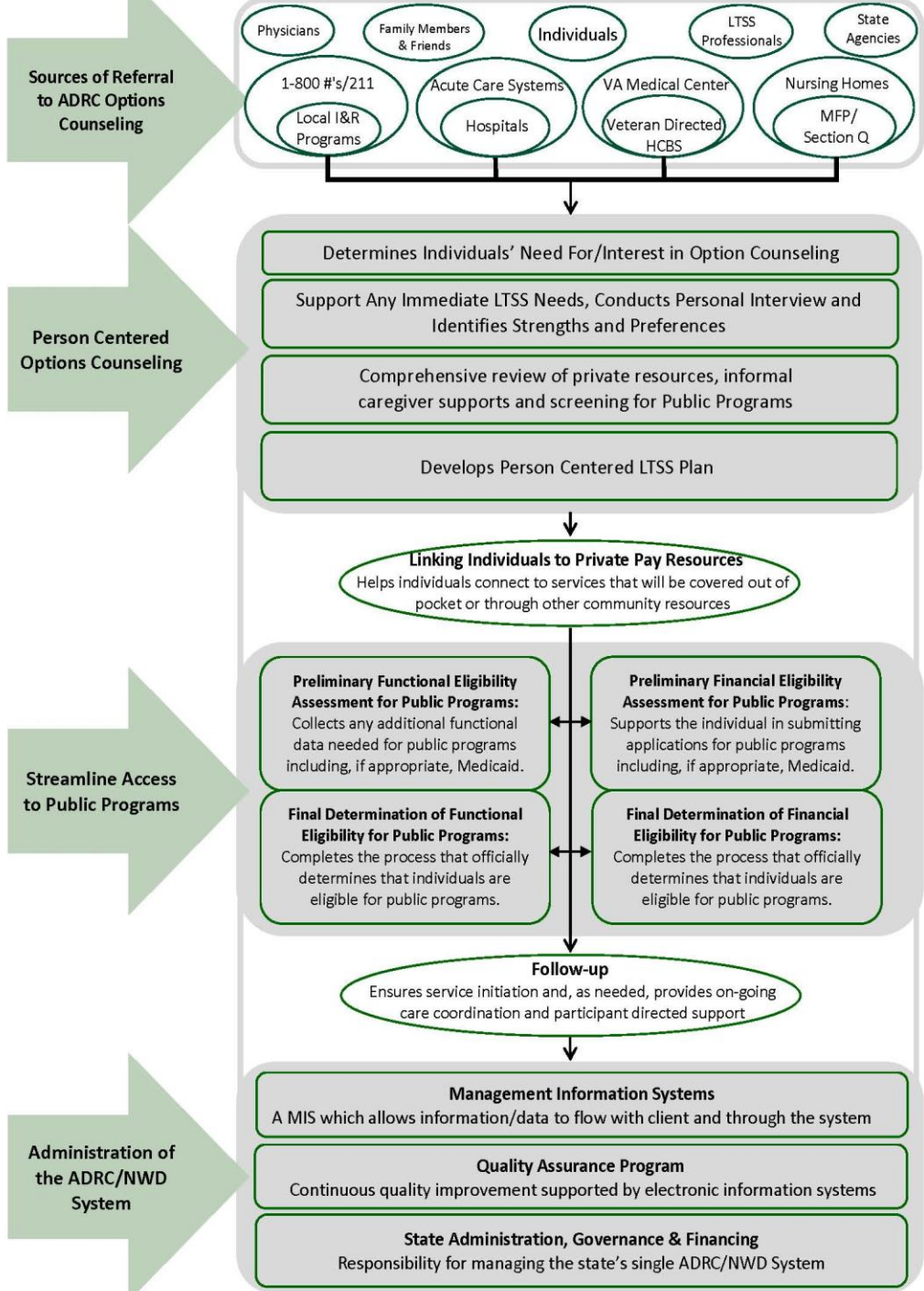
2012 Aging and Disability Resource Center Awards

Administration for Community Living, Center for Medicare & Medicaid Services, Veterans Health Administration



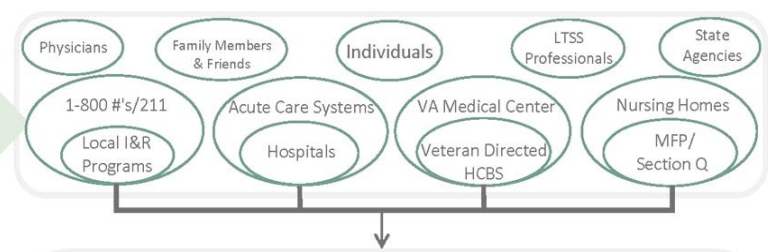
-  Indicates States Awarded Part A (8)
-  States & Territories Awarded Part B (36)
-  Indicates States & Territories Not Eligible for Part B Funding
-  Indicates States & Territories that Did Not Apply for Part B Funding

The NWD/ADRC System

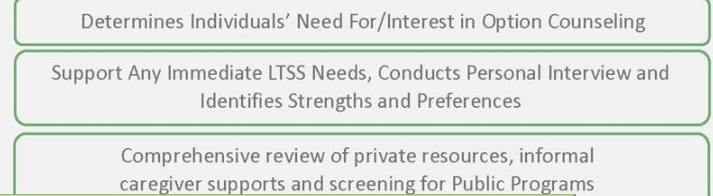


When is an Option Counselor Needed?

Sources of Referral to ADRC Options Counseling



Person Centered Options Counseling



Eligibility Programs: In submitting programs, Medicaid.

of Financial Programs: that officially individuals are programs.

h the system

Administration of the ADRC/NWD System



- ✓ 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

