

ADvantage Point

May 2011



Aging Services Division

Oklahoma Department of Human Services

ADvantage Administration Unit

Upcoming Events

- The 36th Annual Oklahoma Conference on Aging, "Real World, Real Aging":

May 10-12,
Embassy Suites
Norman Hotel
and Conference
Center, Norman.

- ADvantage Administration Unit Case Management Training

May 2-6,
June 6-10,
July 11-15

For more
information,
please visit our
Web site at
www.okdhs.org.

S11033

This publication is authorized by the Oklahoma Commission for Human Services in accordance with state and federal regulations. Copies have not been printed but are available to view and download at www.okdhs.org/library/pubs.

Renewal of the ADvantage Waiver

The Centers for Medicare and Medicaid Services require the Oklahoma Department of Human Services to renew the ADvantage waiver program every five years. CMS approval for the current ADvantage waiver program period is effective through June 30, 2011. A Web-based application template requesting renewal of the ADvantage waiver must be submitted to CMS in early 2011 to assure approval of the request prior to June 30.

Public input meetings were held on Dec. 1, 2010, in Oklahoma City and in Tulsa on Dec. 7, 2010. Several provider agencies attended and participated in these sessions. Additionally, OKDHS has been working closely with the Oklahoma Health Care Authority and the technical assistance staff from Thomson Reuters to assure that the renewal application meets CMS expectations regarding specific quality assurance measures.

A draft of the renewal application may be viewed and downloaded online at <http://okhca.org/individuals.aspx?id=12271>.

If you have any questions about the renewal application or process, please send an inquiry to asd.providerquestions@okdhs.org.



Membership Spotlight: Richard Scott

In an instant, Richard Scott lost his wife, his son and his independence.

But he didn't lose hope.

Born in Oklahoma City, Scott was a typical Oklahoma kid with an atypical ambition.

He wanted to be a filmmaker.

Scott studied the art at Oklahoma State University but couldn't find a movie set in the Sooner State. So, he got a job in the television industry instead, joining the sports team at KJRH-TV in Tulsa in 1983. From there, Scott moved to ESPN where he worked on the nationally syndicated program, "Jimmy Houston Outdoors."

He couldn't lose for winning, it seemed.

But it all changed for Scott one fateful night in the winter of 1994.

Scott, his wife, Sandy, and their 8-year-old son, Austin, were involved in a horrific car accident. Sandy and Austin didn't survive. Scott – who suffered severe injuries, including a broken neck – was paralyzed, but alive.

Not only were there physical wounds that needed mending, but the emotional impact of losing his family, along with his personal and financial viability, was nearly too much to bear.

Scott spent weeks in the hospital gaining enough strength to endure months of inpatient rehabilitation. It was a painful new world for Scott who could no longer take care of himself

without assistance. His parents moved into his home to provide as much support as possible.

When he was at his lowest, *ADvantage* stepped in.

Scott spent weeks in the hospital gaining enough strength to endure months of inpatient rehabilitation. It was a painful new world for Scott who could no longer take care of himself without assistance. His parents moved into his home to provide as much support as possible.

When he was at his lowest, *ADvantage* stepped in.

In the fall of 1994, Scott and his family discovered the *ADvantage* program that Scott calls "the first really good news I had received since the accident."

"I just couldn't believe the amount of assistance that was available and that so many of my needs could be met through this program," Scott said. "The meeting changed my life."

Today, Scott lives independently with the assistance of his golden retriever, Penny: a service dog provided by Therapeutics Service Dogs of Oklahoma.

Penny is Scott's second service dog and has shared his home for nearly four years. His first canine companion, Dreyfus, was with Scott for 11 years before his passing and posthumous induction into the Oklahoma Animal Hall of Fame.

The once aspiring filmmaker shared a little of his movie mania with Dreyfus.

"[We] watched a lot of movies," Scott said. "[Dreyfus] would have been a leading candidate if someone gave out awards to dogs for 'Most Movies Watched'."

(Continued on page 3)

Richard Scott . . .

(Continued from page 2)

Penny, on the other hand, isn't much of a movie-watcher. But what she doesn't do in the film department, she more than makes up for in the detergent department.

"She does laundry," said Scott.

It's actually a tandem act. Scott puts the clothes in the front load washer and Penny removes them when they're done. Scott then puts them in the dryer and when they're dry Penny takes them out and gives them to Scott to fold.

"Unfortunately, Penny just won't fold them right," Scott laughed. "I'm not sure whether she can't do it, or just won't."

Penny also assists Scott with the retrieval of small items like remotes and pens. She even opens doors and drawers and can work a light switch.

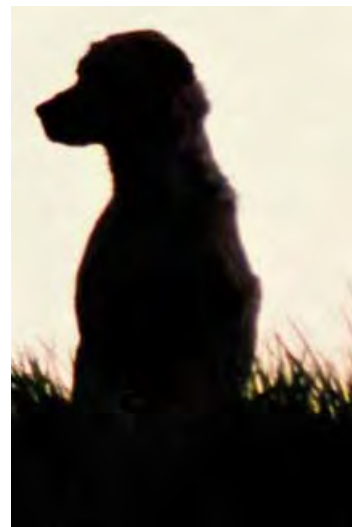
There aren't any dog park vacations for Penny, who's on call 24/7. But there are plenty of perks to the job, according to Scott: "She has great benefits; a warm bed, room to run, companionship and all the food she can eat!"

After losing his own son, Scott is now the mentor to pseudo sons through Big Brothers Big Sisters. The nearly decade-long association has been a perfect fit for Scott who beams like a proud father as he talks about his three "littles"; especially when discussing their shared fanaticism for his alma mater, OSU.

Scott leads a full and productive life, thanks to the support he receives daily from Penny, his family and friends, and the *ADvantage* program.

"My life would be very different if not for my case manager, Glenda, who has been with me since day one, and my aide, Donna, who has been with me for 16 years," Scott said.

"I greatly appreciate everyone that goes the extra mile in order for me to remain independently in my home and I'm always aware of how different my life would be if there was no *ADvantage* program," said Scott. "Please help everyone have the same opportunity." 🌿



Inside the AAU: New Cases ...



The ADvantage Unit
(AAU)

The ADvantage Administration Unit's New Case Processing Unit is a critical first step in the ADvantage program process. The unit is managed by Brenda Lambeth, who is featured in this edition's "AAU Employee Spotlight."

All cases approved for ADvantage begin with the New Case Processing Unit. Once an application has been processed and a person has been determined to be financially and medically eligible, New Case Processing receives the case from the member's Oklahoma Department of Human Services county office of residence. Once the unit confirms and enters all pertinent information, the member's case is assigned to the appropriate provider agencies. The initial Adv6g is issued by fax and copies of the UCAT I and UCAT III are mailed. The provider agencies are then selected by one of two methods: The member may express a preference for provider agencies during the initial UCAT III interview or, if there is no preference, the provider agencies are chosen by round robin selection during processing by the unit.

The New Case Processing unit captures and completes data entry of important information from the Adv9 Provider Communication form, which includes changes in member status. These variations may consist of, but are not limited to, suspension of member services due to traveling out-of-town, hospital admissions or temporary entry into a nursing facility respite. Changes can also encompass reactivations due to home discharge from a hospital - or a return home from an extended trip away - and a change in assignment from one case manager to another.

It is critical that Lambeth and her team of seasoned professionals - Laurie Gilliland, Pamela Evans, Sarah Camden and Angelia Jackson - maintain strong working relationships not only with the OKDHS county offices, but also with the Oklahoma Health Care Authority, Home and Community Based Services Unit Area Nurses and each ADvantage certified provider. The New Case Processing Unit serves as a liaison between all of them. The unit staff takes this role very seriously and strives to ensure that the agencies receive the new member information necessary to begin services quickly. 🌸

Employee Spotlight: Brenda Lambeth



This edition's employee spotlight is on New Case Processing Unit Programs' Manager Brenda Lambeth.

A native of Brownfield, Texas, Lambeth is one of the newest additions to the *ADvantage* Administration Unit family. The daughter of a minister, Lambeth moved frequently, spending much of her childhood in small West Texas towns. As a result, Lambeth developed a love of travel and became quite experienced at moving. In fact, her latest change of address involved relocating her daughter, son and herself to three different residences in a single week.

Lambeth, who holds a Bachelor of Science degree in sociology with a minor in business from Southern Nazarene University, has two sons and a daughter and is a devoted grandmother. Remaining close to her parents and siblings, Lambeth's main hobby is traveling to visit her family.

Before coming to the Oklahoma Department of Human Services, Lambeth was a manager/buyer for a family-owned children's furniture and accessories store. In 2001, Lambeth joined OKDHS as a social services specialist. She has worked for a number of different programs at

OKDHS, including Family Support, Temporary Assistance for Needy Families, food assistance, medical assistance, child care and kinship foster care.

In 2009, Lambeth transferred to the newly-created Adult Day Services unit as the state coordinator. While there, she became familiar with the *ADvantage* program and when a position opened, she applied, hoping to become a part of the admirable project.

Lambeth supervises four employees whose main responsibility is processing all of the paperwork required to certify new service plans, re-certify current members' service plans, reactivate members and process priority cases. Navigating all of the complexities can be challenging, but Lambeth says she loves the challenge and is up to the task of ensuring that all members receive the services they need. 🌿

The Paper Trail: Just Say 'No' to Staples

The *ADvantage* Administration Unit's Member Information Support Services team asks that you just say "no" to staples when preparing documentation for submission to the AAU. All staples must be removed from incoming documentation before it can be processed, which results in extra work for staff, a waste of your staples and unnecessary delay in delivery of paperwork to Service Plan Authorization. Overlooked staples are unkind to the image scanning equipment, not to mention the fingertips of our team. Paperclips are preferred. Also, please make certain that each and every document page has member identification in case the papers get separated.

36th Annual Oklahoma Conference on Aging: “Real World, Real Aging”

The 36th Annual Oklahoma Conference on Aging, “Real World, Real Aging,” will be held in Norman on May 10-12 at the Embassy Suites Norman Hotel and Conference Center.

“The annual conference is the premiere aging event in Oklahoma and is a wonderful opportunity to celebrate the state’s most valuable assets – its seniors,” said Lance Robertson, director of the Oklahoma Department of Human Services’ Aging Services Division, the presenting organization.

Adults 60 and older are invited to the free Senior Day on May 10, which begins at 8 a.m. with a continental breakfast. The day includes workshops, health screenings, a Senior Resource Fair, complimentary lunch and a film festival. Winners of the seniors poetry contest will be announced during the lunch program and a limited number of bound copies of the contest entries will be available.

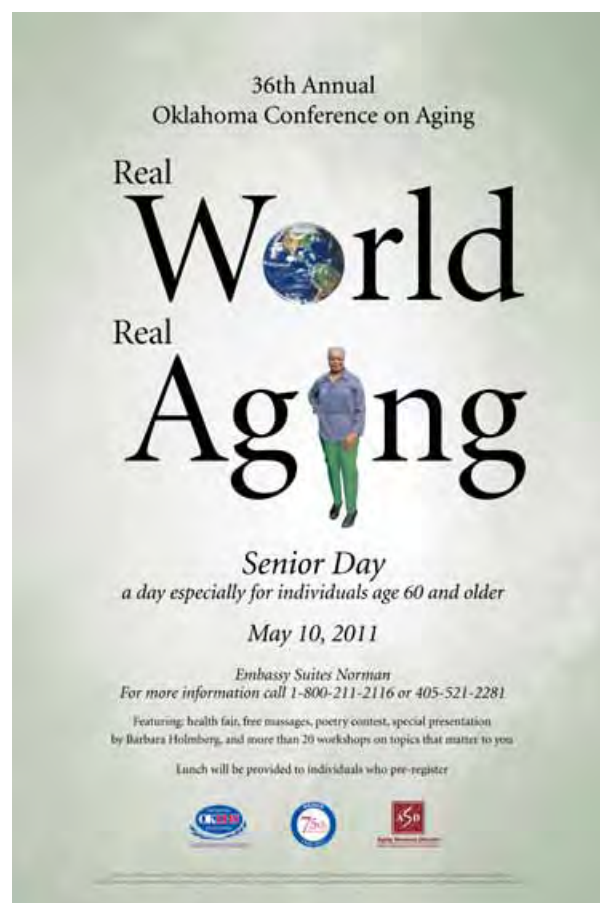
A highlight of Senior Day is the keynote presentation from nurse practitioner, wellness author and Qi Life Coaching Co-founder Barbara Holmberg.

On May 11 and 12, the conference’s

Professional Days will include sessions for aging, health and social services professionals, students, advocates, state officials and corporate representatives.

Author and nationally syndicated columnist Jim Miller will serve as keynote speaker on May 11. Miller is the creator of Savvy Senior, a media/information service devoted to baby boomers, senior citizens and the families who support them. Savvy Senior offers unbiased information through a variety of outlets, including a syndicated column, television,

radio, a newswire service, books and assorted publications.



(Continued on page 7)

“Real World, Real Aging”

(Continued from page 6)

The Achievements in Aging awards luncheon on May 12 will recognize both individuals and organizations that have made significant contributions for older adults in Oklahoma.

More than 40 conference workshops will be offered with topics such as caregiving, senior rights, healthy aging, mental health and aging, resources for community living and professional development. Special features include a film festival and a Senior Resource Fair with more than 60 exhibitors.

All Senior Day activities are free, but registration is required before May 3.

Registration for the conference’s Professional Days is \$75 per day (\$65 per day for attendees 60 or older) and includes workshops, exhibits, general sessions, lunches and breaks. To register, call 405-325-1022.

For general information about the conference, call the Senior Info-Line at 800-211-2116. 🌿

Sarah Camden Wins the Gold!

One of the *ADvantage* Administration Unit’s team members is also a top competitor in Special Olympics.

The AAU’s very own Sarah Camden participated as a member of Team Tulsa Gold at the Special Olympics Oklahoma 2011 Winter Games, Jan. 6 - 8. The games were held at the University of Oklahoma in Norman. Camden and her team won first place gold in the basketball competition and she also received a second place silver medal in bowling.

Camden works on the New Cases Processing team here at the AAU.

Congratulations!

You are always number one with us and we are all very proud of you!



ADvantage Member Monitoring

There seems to be a considerable amount of confusion about what constitutes appropriate ADvantage member monitoring. The answer may differ for each member, but there are absolutes every case manager needs to know and should strive to follow.

Case managers should monitor the member's status during every contact, both directly and indirectly. Direct contact monitoring occurs when the case manager conducts a face-to-face visit or phone call with the member. Indirect monitoring occurs when the case manager is having conversations relating to the member with their homecare nurse, personal care attendant, patient service attendant, informal supports, doctor's office, pharmacy, durable medical equipment provider and others. All of these conversations are focused on the member's current status related to health, safety and independence, and should be documented in the member's case file under progress notes.

There are a variety of aspects of the member's service plan that the case manager is expected to continually monitor and assess.

Member Status and Program Monitoring

The member's community potential is determined by identifying whether they continue to meet the potential of having all of their health and safety needs adequately met while remaining in their home and community.

The level of care for each member can be gauged by determining if their needs would be better met through a nursing facility or maintained successfully at home in the community.

The appropriateness of the program for the member is quantified through financial and categorical eligibility requirements and sufficient provisions for the member's level of need.

Service Plan Monitoring

Service plan monitoring, in general, involves continual observation to ensure the program remains member-centered, member-focused and member-driven, with focus on obtaining/maintaining the member's level of health and safety and the maintenance/enhancement of the member's independence. Specifically, the case manager should constantly evaluate every goal, anticipated outcome and corresponding action steps of the member's service plan to ensure that each is being met or has been delivered appropriately and to the member's satisfaction.

During each monitoring visit or phone call the case manager should review all services, supplies and pieces of equipment as outlined in the member's service plan to ensure they are being provided. They should meet the member's needs and not replace what the member or informal supports are able and willing to do for the member.

Throughout each member-monitoring visit or phone call, the case manager should also assess the effectiveness and stability of informal supports as outlined in the service plan goals.

The information gathered during the monitoring visit regarding each of these areas should be documented thoroughly and concisely in the member's chart with particular emphasis being given to changing conditions and anticipated follow-up actions to be taken.

The case manager should address all deficiencies with services, supplies and/or equipment discovered during the monitoring visit. Corrective actions should be documented on the appropriate ADvantage form and also in the member's case files.

(Continued on page 9)

Monitoring

(Continued from page 8)

Implementation of additional or reduced services, supplies or equipment should be monitored within five days of receipt of the ADv6g approving these changes to make sure they have occurred as authorized. In many of these situations, an in-person monitoring visit is not necessary; a phone call to the member should be adequate. Once again, this monitoring step needs to be documented by the case manager in the member's case file.

Monitoring Frequency

Five days after any service authorization, the transition into implementation should be monitored to determine if an interim health and safety plan needs to be developed by a new team.

Within 30 calendar days after Service Plan or Service Plan Addendum authorization, there should be monitoring of health and safety status, progress towards service plan goals, member services satisfaction and identification of any major life changes.

At a minimum, an *ADvantage* member must receive monthly monitoring from the case manager. Per the *ADvantage* case management standards, a minimum of one quarterly home visit with the member is required with monthly monitoring visits by phone each of the two months between face-to-face visits. Monthly monitoring activities can be conducted by phone only if the member demonstrates cognitive and communication ability to provide valid information. The purpose of each visit is to monitor health and safety status as related to progress toward service plan goals, member satisfaction with services and identification of any major life changes.

In the event that a member demonstrates the inability to provide valid information due to cognitive and/or communicative disability, the case manager is required, at a minimum, to have a monthly face-to-face visit with the member.

The case manager must provide at least one monthly home visit when a member's family member serves as a paid caregiver. This allows the case manager to provide additional personal care attendant oversight in addition to monitoring the member's health and safety, satisfaction with services and identification of any major life changes.

The case manager is required to make and document a weekly telephone visit when a member is unstaffed. This provides more frequent monitoring of health and safety status in the absence of the personal care attendant's weekly/daily visits and to assess the effectiveness of the back-up plan and the possible need to change providers. The case manager also contacts the home care agency to monitor the recruiting activities of the provider to determine when and whether a change of provider is indicated. Weekly phone call monitoring occurs until the member is staffed.

These standards are referenced from Oklahoma Administrative Code (OAC) 317:35-17, as well as the *ADvantage* program Case Management Standards. They are the minimum requirements that must be met in order to be in compliance with policy. There will be times that due to a member experiencing crisis, either in their own status or in the status of their informal supports, the case manager may need to increase monitoring frequency for a limited period of time to assist the member to re-establish stability to their condition. There are also members who prefer not to have monthly face-to-face visits from their case manager. If specified criteria are

(Continued on page 10)

Monitoring

(Continued from page 9)

as a participant in a member-centered, member-driven program like *ADvantage*.

Documentation is Crucial

During each monitoring visit, the case manager should document their review of every goal of the service plan with the member. Documentation needs to address services, supplies and/or equipment. Have they been delivered as outlined in the service plan goals

and are they adequately meeting the member's needs/goals? Is the member satisfied with each service provided? The documentation should address measures of progress toward, or achievement of, anticipated outcomes.

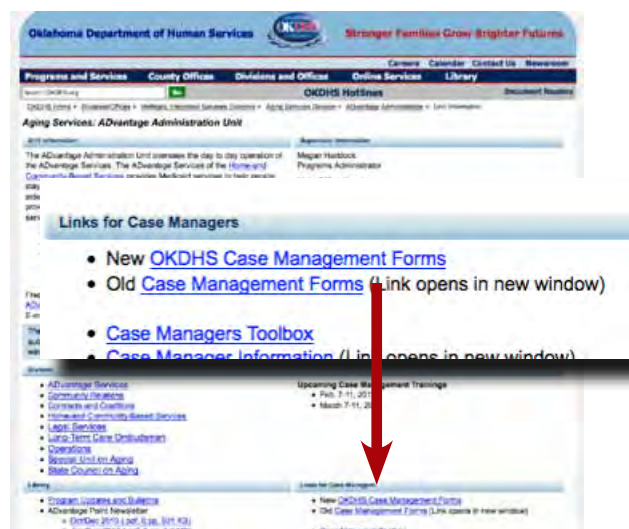
Regression, loss of function or deterioration the member is experiencing should also be noted.

Complete and concise is always best practice. Keep focused on the member and document information pertinent to what affects their ability to maintain their health conditions, preserve a safe environment, remain as independent as possible in their home and active in their community while preventing premature institutionalization. After all, that is the real *ADvantage*. 🌿

New Forms and Web Site

As mentioned previously, the *ADvantage* Administration Unit has begun the process of converting all of our forms to meet the Oklahoma Department of Human Services' guidelines for compliance with the Americans with Disabilities Act. While this is a slow process, we are pleased to announce that several of our forms are now available on the OKDHS Web site. You may access them by going to our new online home at <http://www.okdhs.org/divisionsoffices/visd/asd/advadm/>. Select "New OKDHS Case Management Forms" under the "Links for Case Managers" section. There is also a link to the forms on the www.advantage.ok.gov Web site. At this point, we have not set an official implementation date, but we would encourage you to look over the new forms and begin using them now.

While the current www.advantage.ok.gov Web site will not be going away any time soon, new content is not being added and eventually everything will be moved to the new site on the



www.okdhs.org domain. Currently, most items link back to the www.advantage.ok.gov Web site, but we will be updating the links as items are made compliant with OKDHS Web standards. To quickly find us, go to <http://www.okdhs.org> and click on "A-Z List of Programs/Services" under the "Quick Links" box, then click "ADvantage Administration." Please note that there is also a link to "ADvantage Services." That site provides members with information about the *ADvantage* program, while "ADvantage Administration" contains information for our providers. 🌿