Upcoming Events

- 2013 Senior Day at the Capitol
  Feb. 25, 2013
  Oklahoma State Capitol Building
  Oklahoma City, OK
  Visit www.okseniorday.com for more information.

- 38th Annual Oklahoma Conference on Aging
  “The Road to Aging Well: Enjoy Your Trip”
  May 21-23, 2013
  Embassy Suites Norman Hotel & Conference Center
  Norman, OK
  Visit www.okagingconference.com for more information.

CD-PASS Expands to Pittsburg County

In 2004, the ADvantage Program introduced the Consumer-Directed Personal Assistance Services and Supports (CD-PASS) service option, allowing eligible Members to direct their personal care services. Until recently, only residents of Creek, Rogers, Tulsa and Wagoner Counties, plus select zip codes in Osage County, were eligible for the CD-PASS service option.

However, the state proposed in the recent Home and Community-Based Services Waiver renewal to slowly expand the CD-PASS service option until it is available to every ADvantage Member statewide.

On July 1, 2012, ADvantage Members residing in Pittsburg County received notification they were eligible for this service option and as of the end of August two participants from Pittsburg County are directing their personal care services.

The AAU is excited about the CD-PASS expansion and plans to add additional counties at the end of the fiscal year. Currently 585 people are enrolled in the CD-PASS service option.

Transfer Reminders

Facilitating a smooth transfer of home health services for an ADvantage Program Member can be a big challenge for case managers. Allowing adequate time to process the transfer and to communicate with all parties involved can help ensure an effective transfer of services.

Once a Member notifies the case manager of his or her desire to change home healthcare provider agencies, the case manager completes the ADv10, Change of Provider form, with the Member. By completing the ADv10, the Member authorizes the case manager to share private information with the new provider selected.

The case manager contacts the current provider’s staffing coordinator by phone and advises the provider of the

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Member Spotlight: Charlene Willis

Charlene Willis was born in Kansas City, Kan., and was raised in Amarillo, Texas. She was the only child to her parents, Zelene and Charlie Copeland. She was married for 13 years to J.E. Willis and they had three daughters. Sadly, their eldest daughter died in 1996 as a result of breast cancer. Willis has three granddaughters and one grandson.

Willis was a nurse for many years and worked all over the country in different hospitals and doctors’ offices. She eventually became an office manager. In the 1970s, she worked as an office manager in Roswell, N.M., and was hired by a businessman to assist with organizing offices and conventions. Every three months, she organized business conventions and also set up an office in Beverly Hills, Calif.

In the 1990s, Willis moved her mother to Tulsa and became her mother’s primary caregiver as a result of her mother’s declining health. Over time, her mother’s needs increased and Willis’ health also began to decline, yet she remained adamant that her mother remain at home for as long as possible. She was dissatisfied with the quality of care from the agency she was utilizing to assist in her mother’s care and learned of the ADvantage program while talking with one of the aides. After one of her mother’s nurses explained the ADvantage program to her, she happily applied to the program for her mother, who was accepted.

In 2006, Willis’ own health deteriorated to the point it prompted her to apply for the ADvantage program. When she applied, she learned about the Consumer-Directed Personal Assistance Services and Supports (CD-PASS) service option. Willis enrolled her mother and herself into the CD-PASS service option.

CD-PASS is available to ADvantage Members who need personal assistance services. In CD-PASS, the Member is the employer and controls how and when services are delivered. The Member makes and directs all decisions regarding their personal care services including hiring, training and directing the aides who perform their personal care services.

Willis says the ADvantage program benefits her “in every way you can think of.” She compliments her case manager and her personal services assistant, and says her case manager acquired several items for her which she could not have afforded otherwise.

Willis emphasizes that more people should learn about the ADvantage program. She is extremely happy with the services she and her mother have received and says, “(for) anyone that really needs someone to come in to help them, it would be an advantage.”

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Inside the AAU: Provider Questions, Contracts and Escalated Member Issues

The AAU Provider/Member Relations group is often a provider’s first point of contact with the ADvantage program and handles the bulk of communication between providers and the AAU. The group is led by Melinda Spaulding, programs assistant administrator, and program managers Brenda Lambeth and Linda Yeargain.

The AAU Provider/Member Relations group handles provider contracts, answers questions from providers, and resolves escalated Member issues. These three areas have significant overlap and, as such, are housed together in the same work area to allow “real time” communication. This helps answer questions faster and maintain consistent application of policies and procedures.

Provider Questions

Brenda Thrasher and Jeanene Bushyhead, programs field representatives (with backup from Melinda Carter, program field representative) respond to questions via e-mail from providers and OKDHS personnel.

E-mail is the preferred way to ask questions that require immediate attention. Most of the time, Thrasher and Bushyhead have the knowledge and experience to answer the question or resolve the issue without assistance. However, if unable to immediately answer or resolve a question, they send it to AAU supervisor, managers and key personnel to resolve the issue or get the correct answer as soon as possible.

Fielding receives e-mail from all ADvantage providers and OKDHS employees statewide, and responding within 24 working hours is a huge challenge, but Thrasher and Bushyhead are up to the task.

Contracts

Contracts are a critical component to everything that happens with the ADvantage program. Without contracts with providers, the ADvantage Program would not be able to provide all of the quality services that are available. Bushyhead tracks which providers meet the criteria to apply to be an ADvantage partner, which ones are approved to provide services, and which ones are available for referral. The Contracts section keeps the AAU in business with our provider agencies.

Escalated Member Issues

The ADvantage Program is Member-focused and any Member issue that cannot be resolved at another level is sent to Escalated Member Issues.

ADvantage Members have different needs and, as such, the program must adapt to meet this variety of needs. Fortunately, the ADvantage partners around the state are very flexible and able to meet most challenges without intervention by the AAU. However, each day the AAU’s Escalated Member Issues team gets several new problems to resolve.

Jonathan Vanbeber and Susan Adair, program field representatives, staff the AAU Escalated Issues team. They contact providers within two business days of being notified of a problem and will work on the issue until it is resolved. When a team member contacts a provider, they wish to resolve an issue and get the appropriate services for the Member.

The AAU’s Provider/Member Relations group shares the same objective as ADvantage providers across the state: to do the best job possible to ensure Members get the services they need to safely remain in their home. And the group meets its goal by working with ADvantage contracted partners, providing needed information in a timely manner and resolving big issues so they do not get bigger.
Team Spotlight: Melinda Spaulding
Program Assistant Administrator,
Provider/Member Relations

Melinda Spaulding was born and raised in Tulsa and attended Oklahoma State University. She met her husband while studying at OSU and they have been married for 24 years. She graduated from OSU with a bachelor’s degree in special education. She continued her education and received a master’s degree in learning disabilities.

After graduating from OSU, Spaulding taught school in Chandler for three years, dividing her day between the elementary school and the junior high school. After that, she took a position in Tulsa County with the Developmental Center working with students with profound intellectual disabilities until the center closed. Spaulding then worked with Bethphage for seven and a half years, initially as a house manager and then as a programs manager. Most of Bethphage’s clients were individuals who moved out of the Hissom Memorial Center and into the community, many of whom were medically fragile.

Spaulding began working with the Long Term Care Authority in 1998 as an ADvantage field representative. One of her duties was to certify service plans at provider sites. While at LTCA, she also worked in auditing and as the manager for Escalated Issues and the Resource Center. She also worked an additional three years with Provider Question. Spaulding now serves as the programs assistant administrator over Reception, the Resource Center, Contracts, Provider Question, Assisted Living, Escalated Issues, and New Case Processing.

The Paper Trail...Correct Routing of Documentation

Provider agencies offer several programs that use forms and documentation similar to ADvantage Program forms. Some common examples are the Living Choice Project, My Life, My Choice Waiver and State Plan Personal Care.

These programs are administered by different entities and the AAU frequently receives documentation intended for these other programs. These documents often contain confidential information and, in the interest of protecting Member privacy, it is vital that agencies deliver documentation to the correct program.

AAU is requesting agencies to review their documentation routing and submission processes to help ensure efficient delivery of paperwork.

- ADvantage Program: Submit documents by mail to the OKDHS ADvantage Administration Unit, P.O. Box 50550, Tulsa, OK 74150. Justified priority documentation can be faxed to (405) 230-8019.
- Living Choice Project: Submit documents to Oklahoma Health Care Authority via fax to (405) 530-7265.
- My Life, My Choice Waiver: Submit documents to OHCA via fax to (405) 530-7265.
- State Plan Personal Care: Submit documents to the assigned OKDHS Long-Term Care Nurse at the appropriate OKDHS county office. Contact information for OKDHS county offices can be found at the following link: http://www.okdhs.org/okdhslocal.
2012 Senior Day at the Capitol

Each year, the OKDHS Aging Services Division hosts the annual Senior Day at the Capitol and this year’s event was well attended by nearly 600 seniors and advocates at the state capitol in Oklahoma City. The group filled the House of Representatives chambers and capitol hallways for presentations from a variety of speakers on Feb. 27.

Tim Hataway, then-chairman of the Oklahoma State Council on Aging, started the program and was followed by Lt. Gov. Todd Lamb, who welcomed everyone to the Capitol. Oklahoma’s Secretary of Health and Human Services and Commissioner of Health Terry Cline then reported on Oklahomans’ health, noting that Oklahoma ranked 48th in 2011 national health rankings. Cline encouraged all Oklahomans to practice better health habits which include eating more fresh fruits and vegetables and moving more every day.

Insurance Commissioner John Doak spoke about insurance concerns for seniors. Shirley Cox, ASD legal services developer, Esther Houser, state long-term care ombudsman, and Dusty Darr, AARP Oklahoma associate state director of advocacy, gave a report on legislation that could impact Oklahoma seniors. Lance Robertson, ASD director, closed the program with encouraging remarks for everyone in attendance.

Senior Day participants visited representatives and senators to discuss their positions on the issues. They also enjoyed visiting the non-profit exhibitor agencies and organizations on the second floor of the Capitol rotunda. The exhibitors included:

- AARP Oklahoma
- Cherokee Elder Care/PACE
- Court Appointed Advocates for Vulnerable Adults of Oklahoma
- Faye Donalson Hearing Helpers Demonstration Room
- HOPE Community Services, Inc.
- LeadingAge Oklahoma
- Legal Aid Services of Oklahoma, Inc.
- National Association of Mental Illness of Oklahoma
- NewView Oklahoma
- OKDHS, Aging Services Division
- OKDHS, Ombudsman Program
- Oklahoma Alliance on Aging
- Oklahoma Alzheimer’s Association
- Oklahoma City Mayor’s Committee on Disability Concerns
- Oklahoma Department of Rehabilitation Services, Division of Visual Services
- Oklahoma Foundation for Medical Quality
- Oklahoma Health Care Authority/ Focus on Excellence
- Oklahoma Library for the Blind and Physically Handicapped
- Oklahoma Senior Corps Directors Association
- Oklahoma Silver Haired Legislature
- Oklahoma State Department of Health- Emergency Preparedness
- Oklahoma Statewide Independent Living Council
- Parkinson Foundation of Oklahoma
- Regional Food Bank of Oklahoma
- Senior Health Insurance Counseling Program
- Social Security Administration
- Sunbeam Family Services

The 2012 event was sponsored by the OKDHS Aging Services Division in partnership with Oklahoma State Council on Aging, AARP Oklahoma, Oklahoma Alliance on Aging and the Oklahoma Silver Haired Legislature.

Planning is underway for the 2013 Senior Day at the Capitol, which is scheduled for Monday, Feb. 25. Visit [www.okseniorday.com](http://www.okseniorday.com) for more information.
The 37th Annual Oklahoma Conference on Aging “Secrets of Aging: Hidden Treasures” was a resounding success May 15-17, 2012 at the Embassy Suites Norman Hotel and Conference Center. More than 900 seniors age 60 and older attended Senior Day.

Senior Day is free to seniors 60 and older and included continental breakfast and a Senior Health Expo with health screenings, demonstrations and exhibitors. Senior Day also featured more than 20 workshops, 70 exhibitors, free chair massages, a film festival, luncheon and door prizes. Senior Day keynote speakers included 2011 Ms. Senior Oklahoma Vickey Rose and Dr. Bruce Carnes, OUHSC Reynolds Department of Geriatric Medicine.

Statewide Poetry Contest winners were announced during the luncheon. The winning poems were selected from nearly 300 poems submitted by Oklahomans 60 years of age or older. The Women’s Division winner was Mary McReynolds, Arcadia, with her poem “Origami Mommi.” Margaret Farmer, Norman, took second place with “Texture” and Lynda Stephenson, Edmond, took third place with “The Summer of Our Discontent.”

Carl Sennhenn, Norman, won first place in the Men’s Division with his poem “She, at the Very Last.” Clark Elliott, Oklahoma City, took second place with “Just Imagine” and Ted Petty, Edmond, took third place with “Just Before.” OKDHS Aging Services Division Director Lance Robertson presented the awards and contest winners read their poems to an audience of conference attendees. The winning poems may be read at www.okagingconference.com.

The Statewide Spelling Bee regional contestants competed to determine the state winner, which was determined after 40 competitive rounds. Donna Knox, Alva, took first place, Nancy Woods, Gage, took second place and Mary Harmon, Rattan, won third place.

The conference Professional Days featured national speakers Kathy Greenlee, Administration for Community Living/Assistant Secretary for Aging, and Karyne Jones, President and CEO, National Caucus and Center on Black Aged, Inc.

The Professional Days also featured 40 workshops, UCAT training for ASD nurses and the annual ASD “Achievement in Aging” awards luncheon. The 2012 Achievement in Aging award winners were:

- Grand Gateway Area Agency on Aging - Aging Network Partner of the Year
- Trish Emig – Advocate of the Year
- Masonic Charity Foundation of Oklahoma – Business Partner of the Year
- Howard H. Hendrick – Lifetime Achievement
- Eunice Khoury – Media Partner of the Year
- Thomas A. Teasdale, DrPH - Professional of the Year
- Medicare Part D Diabetes Health Screening Initiative – Program of the Year
- Chuck Clark – Volunteer of the Year
The process of closing a Member’s case seems to be a common area of confusion for agencies and case managers across the state. This article aims to clarify some of the most frequently encountered problems and provide a “right way” to request case closure.

The AAU commonly sees confusion regarding five types of case closures: withdrawals, nursing facility admissions, unable to locate, non-compliance and unsafe for providers. The names of these closure issues are based on reasons providers have listed for closure, not specific closures defined in OAC, OKDHS policy or COPP documents.

Withdrawals: Many case managers are not familiar with the ADv2 for voluntary withdrawal requests or when to use the ADv15 for voluntary withdrawals.

The ADv2 is specifically intended to be used by the Member to voluntarily withdraw from the program. Use an ADv15 if the Member is unavailable or unwilling to sign after expressing desire to withdraw. The case manager must document on the ADv15 the reason the Member wants to withdraw and what alternatives for services are available.

Nursing Facility Admissions: When a Member is admitted to a nursing facility, the first thing to determine is whether the admission is for skilled nursing, rehabilitation or long-term care.

If the admission is for skilled nursing or rehabilitation, the ADvantage case should only be suspended and may remain open for 100 days. Send a completed ADv9 to the AAU notifying the AAU of the admission and provide the name and phone number of the facility. The Member will be placed on “suspend” status.

If a Member enters long-term care at a nursing facility, then complete an ADv15 for closure and send to the AAU. Include the name and phone number of the nursing facility on the ADv15.

Unable to Locate: Many Members move without notifying their providers or giving their new address. When a Member cannot be located, AAU asks case managers and providers to make all reasonable efforts to contact the Member, rather than immediately requesting case closure. The case manager should attempt to contact the Member by completing the following steps, at minimum:

- Attempt to contact the Member by phone and in person;
- Call each contact/emergency contact number to attempt to find the Member’s new location and contact information. Continue trying to reach the Member’s contacts until the day the closure request is sent to the AAU;
- Contact the OKDHS county worker and ask for current contact information; and,
- Send a letter by certified mail to the Member’s last known address.

The letter should advise the Member that his/her case will be closed if the case manager cannot locate the Member. The letter should also advise that the Member can call the ADvantage Care Line to request an administrative transfer to another agency. Occasionally, Members will want to change agencies, but will not want to communicate with their current case manager.

If the Member cannot be located for 30 days, it is generally recommended that the Member first be placed on “suspend” status. The case manager will need to notify all service providers of suspension. When the verification of delivery to the Member or failure to deliver the letter by certified mail is received, then an ADv15 should be sent in with supporting documentation of these efforts.

Non-Compliance: For closures due to “non-compliance,” an ADv15 without documentation is not sufficient to justify case closure. Attach supporting documentation to the ADv15 describing the specific instances of non-compliance and actions taken by the case manager, or other inter-disciplinary team (IDT)

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members, to address the non-compliance. These closure requests require careful review by AAU staff and often result in transfers, withdrawals or a solution other than case closure.

Sending an ADv9 to the AAU regarding the Member’s non-compliance is the preferred initial step, unless the agency believes sufficient documentation exists to warrant closure rather than other available options.

Another type of non-compliance is when a Member refuses care yet also refuses to withdraw from the program. A request for closure is not the appropriate first step.

AAU recommends first engaging the Member in a Negotiated Risk Agreement (NRA). For example, if a Member refuses PCA services, the case manager documents on the goals that the Member does not want the services, although other IDT members agree the services are needed. The Member would accept responsibility for bathing, home care and all personal errands. If the Member then does not comply with the NRA a closure request may be warranted.

Unsafe for Providers: In the unfortunate instance when a Member is physically abusive or other persons who visit the home are a danger to agency personnel, case managers may request closure of the Member’s case. However, significant efforts to resolve the situation are required to be undertaken, if possible.

Most often, AAU will recommend completing an NRA with the Member to explain the risks and limitations of staff. This gives notice to the Member that services may be withdrawn if the staff in the home are not safe.

When a Member’s problematic behavior may be modified, services to assist the Member to decrease the problematic behavior should be considered. If closure is still needed, complete an ADv15 and provide accurate documentation of the problematic behaviors or conditions in the home, and the actions taken to reduce the same.

The AAU wants to work with case managers to ensure cases are closed in a timely fashion but also without unnecessary errors that result in service-delivery disruptions or violate our policies and procedures. We appreciate all of the hard work case managers do every day and hope this information will help navigate the ADvantage program.

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6 Degrees to Harry Potter
A Connection to AAU’s Cathy Gervasio

“Six Degrees of Separation” is an idea that everyone is six steps away, by way of introduction, from any other person in the world. And getting to know Cathy Gervasio, Service Plan Authorization Unit, will connect you to the world of Harry Potter. Gervasio has a great appreciation for and knowledge of the performing arts. Her aspirations and pursuit of becoming an actress, and eventually a director, began in her youth.

“My first theatrical productions occurred on a farm in south east Missouri when I was about three years old. It was on a picnic blanket stage, spread under the oak tree where my teddy bear and I would act out my favorite stories for an audience of our dog, cat, a few dozen chickens and sheep,” Gervasio recalls.

It was not until the sixth grade, after Gervasio’s family moved to Arizona, that she found herself in the chorus of “HMS Pinafore,” which would be the springboard to a lifelong association in the arts. One year later she wrote, produced, directed and starred in a one-act play adapted from one of Laura Ingles Wilder’s “Little House on the Prairie” books as a class project.

Gervasio continued her love for acting while studying pre-law in college. Through the years, she has worked on more than 50 productions in various capacities ranging from hair and make-up, lighting, sound, set design and construction, costuming and ushering to assistant stage manager, stage manager, box office manager, assistant director, director and producer.

Most recently, Gervasio completed a term as board member at Theatre Tulsa which prides itself as being the oldest community theatre west of the Mississippi River, where she also directed productions. She is currently working on a project at the Dennis Neil Equality Center of Tulsa. These days, Gervasio satisfies her need to perform by assisting the AAU’s training department with role-playing activities during case management training.

So how are you now six-degrees of separation away from Harry Potter? Now you know (1) Gervasio who knows (2) Mark Litton, co-writer of “Star Hunter,” which starred (3) Roddy McDowell. McDowell was in “The Planet of the Apes” with (4) Charlton Heston, who was in “Hamlet” with (5) Kenneth Branagh. Branagh played Professor Lockhart in “Harry Potter and the Chamber of Secrets” and worked with (6) Daniel Radcliffe, who portrayed Harry Potter.