Upcoming Events
- Case Management Orientation Training:
  - December 2-6, 2013
  - January 6-10, 2014
  - February 3-7, 2014
  - March 3-4, 2014
  - April 7-11, 2014
For more information, visit http://www.okdhs.org/programsandservices/aging/adw

Did You Know?
Since 1993, more than 74,000 Oklahomans have been on the ADvantage program.

Member Spotlights:
Reflections on 20 Years of ADvantage

In celebration of the 20th anniversary of the ADvantage program, we highlight six longtime, inspirational Members who shared their experiences, advice and observations about the ADvantage program.

James Stalling – Member since
December 1993
Since an automobile accident in 1982, James Stalling has lived with quadriplegia. His ADvantage personal

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Eight staffers reach milestone

In ADvantage Administration’s 20th year, staff have 400 years of combined experience with the program. These employees have been with ADvantage for 15 years or more: Brenda Thrasher, Provider Questions; Carolyn Gray, Closures; Jeanene Bushyhead, Contracts; Deborah Norton, Resource Center; Evelyn Ballinger, Service Plan Authorization; Laurie Gilliland, New Case Processing; Sarah Camden, New Case Processing; and Melinda Spaulding, programs assistant administrator.
Member Spotlights
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care assistant (PCA) helps him transfer in and out of bed and he is extremely independent once he is in his wheelchair. Stalling even does his own meal preparation.

The ADvantage program services Stalling finds most useful are the PCA, housekeeping and — most of all — transfers into and out of bed. When asked what he thought were some of the best improvements to the ADvantage program since he became a Member, he said the addition of the Consumer Directed Personal Assistance Services and Supports (CD-PASS) service option. With CD-PASS, Stalling is able to directly hire, supervise and schedule his own PCA who comes over twice a day — every day!

His advice to new ADvantage Members is to get a good case manager who listens, talks to you and understands you. He encourages everyone to do the best they can do for themselves and “kick yourself in the butt and get going” if you need to. He is very thankful for ADvantage, CD-PASS, and everyone who has enabled him to remain in his own home where he is able to enjoy the company of his three adorable dogs. Stalling wants to thank all of his caregivers and his present case manager Robert “Bob” Groth with LIFE Senior Services.

Postscript: James Stalling died suddenly on Sept. 8, 2013, shortly after the interview for this article. He will be deeply missed by his family, friends and beloved dogs.

Beverly Lentz – Member since September 1994

Like many others, Beverly Lentz was at a low point in her life when she heard about the ADvantage program. “I don’t know what my life would be like without the ADvantage program. I don’t have much family and I was going through a divorce when my health got really bad. I had no resources of my own. Ability Resources told me about a new program that might help me. I have been with the ADvantage program ever since.”

“ADvantage has helped me maintain my independence and kept me out of a nursing home.”

Lentz says the entire program has helped her, but she feels the best service is case management. “Your case manager can organize everything for you and help you with all your needs, even some things you didn’t know about,” said Lentz. Her advice to new ADvantage Members, “Be your own best advocate. Always ask questions.” She would like to recognize Pam Wilson, who began as her nurse and later served as her case manager with Oxford Health Care for many years until Pam’s retirement. “Pam made such a difference in my life — I miss her,” Lentz says.

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Did You Know?
The “A” and “D” in ADvantage stand for "aging" and "disabled."
Suzette Riordan  
– Member since 1994

Suzette Riordan was 30 years old when a motor vehicle accident damaged her vision and left her partially paralyzed. When she found herself in a skilled nursing facility following her release from the hospital, an ombudsman asked what she needed, to which she replied, “To get out of here! I’m too young to be in a nursing home!” She was referred to Ability Resources and the new ADvantage program helped her do just that.

“ADvantage has helped me maintain my independence and kept me out of a nursing home,” Riordan says. “Wonderful provider care has kept me safe and healthy.” Her advice to new Members is simple: “Get a good case manager to advocate for your needs, because sometimes you don’t even know what your needs are, but they do.” She would like to give special thanks to her current case manager, Margaret Pavletich, with Ability Resources who “has had my back for 19 years.” Riordan uses several PCAs to cover her daily needs for morning and evening care. The PCAs assist her with tasks including transferring from bed to her electric wheelchair and other homemaking tasks and errands.

Richard Scott  
- Member since April 1995

A car accident changed Richard Scott’s life in an instant. He lost his wife, his son and his independence. Scott was paralyzed by the accident and, after weeks of hospitalization, his parents moved in with him to provide support. When he found the ADvantage program, Scott said it changed his life.

The ADvantage program has allowed Scott to live in his own home, remain independent, receive care he would otherwise be unable to afford, and obtain vital emotional support. He has had the same incredible caregiver for the past 17 years.

Scott could not think of any changes which have improved ADvantage because he feels it has been great from the beginning. ADvantage has always met his needs and he has had no problems. The services he finds most useful within the ADvantage program are his PCA, housekeeping, transfers into and out of bed, and the care and attention given to his service dog, Charlie.

His advice to new and potential ADvantage Members is to realize you are not on your own. You now have a team of people helping you to remain independent and have fewer worries. Scott says, “ADvantage will change your life.” If you are thinking about applying, “Do it! Go for it!” Scott wants to thank all of his present and past caregivers, his case manager Glenda Bivens with Ability Resources, and Oxford office staff MaryAnn and Doris for their excellent service.

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Member Spotlights
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Terry Osburn – Member since August 1995

Terry Osburn doesn’t remember who first referred her to the ADvantage program, but thinks it was most likely her mother. Her lack of recall is understandable as, at the time, she was busy fighting for her life. She had a rare and often severe allergic reaction to a sulfa antibiotic. After six days on the medication, the cause of her worsening symptoms was discovered and she was rushed to the hospital. She remained there for six months and underwent more than 30 operations. During her ordeal, she lost four fingers and both legs nearly to the hip. Her doctors didn’t expect her to survive. With her faith, determination and sense of humor she proved them wrong. After release from the hospital, her mother’s loving care and admission to the new ADvantage program allowed her to return to her own home and finish raising her four young children, something that had seemed impossible.

Osburn says that having someone help her with meal preparation and housekeeping and having a physical therapist made all the difference in her life. It was having a great case manager who made certain she got what she needed that helped her the most. Her advice to new ADvantage Members is, “Make sure you have a good case manager. They will often provide you with things you didn’t even know you needed until you have them and they make your life easier. Also, be open to counseling or mental health therapy. You are facing some serious issues with your health or you wouldn’t be on the ADvantage program. Having a professional to talk to can help you with the changes you are going through.”

Osburn has participated in the CD-PASS service option for a few years. She would like to give thanks to her late mother, Lily Osburn; Dr. Hoffman at the Veterans Administration; Shade, who has been with her for many years; all of her OUCN case workers; and Martha Spann with ADvantage Administration for always answering questions and looking out for her.

“I was given a second chance at life, and, with God’s continued help, I will go on as best I can. Without the ADvantage program, I don’t know what I would do.”

Hargus Swan – Member since 1995

Hargus Swan is 90 years young and able to realize her desire to live independently thanks to the ADvantage program. A variety of health conditions, decreased mobility, and severe vision and hearing impairments have made communication increasingly difficult for Swan over the past several years. With the ADvantage program’s skilled nursing supervision services, she is able to test her own blood sugar twice daily and self-administer her medication. The ADvantage program provides her with durable medical equipment including a walker to assist with ambulation, and bathing equipment which allows her to continue to complete her own personal care. An ADvantage PCA helps Swan with laundry, housekeeping, meal preparation and errands. She also receives home-delivered meals a few times per week. Swan and

“Without the ADvantage program, I don’t know what I would do.”

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her PCA Lakayla express great fondness for one another and sometimes visit even when Lakayla is not working.

Without the help from her PCA, Swan believes she would be living in a nursing facility instead of enjoying the peace of her own home. Swan says she also has a wonderful relationship with Kristy Wellstead, her current case manager from LIFE Senior Services, who has been her case management provider since 1995.

Providers 1993-1995 to present

Ability Resources
LIFE Senior Services
Girling Health Care Inc.
ASCOG
Country Style Health Care IV
Gentiva Health Services
Healthcare Innovations Private Services
Med-Corp Plus, Inc.
Oxford Health Care
OU-College of Nursing
EODD
Cherokee Nation
Grand Gateway
Red River
SWODA
Access Home Care
Entrusted Hearts
Washington County Eldercare
Mays Plus

15+ Years MSU Staff

Jane Armstrong, RN – 20 years
Janie Christian, RN – 20 years
Lea Ann Cook, RN – 20 years
Jimmie Coulter, RN – 20 years
Toni Hughes, RN – 20 years
Connie Lutonsky, RN – 20 years
Maggie Mugg, RN – 20 years
Debra Robison, RN – 20 years
Kim Sanders, RN – 20 years
Dana Underwood, RN – 20 years
Cathy Amason, RN – 19 years
Judy Watson, RN – 19 years
Deborah Riggs, RN – 18 years
Jan Biehl, RN – 17 years
Brenda Thrasher – 17 years
Sherry Vaughn, RN – 17 years
Wendy Bacon, RN – 16 years
Jeanene Bushyhead – 16 years
Carolyn Gray – 16 years
Debbie Thompson, RN – 16 years
Evelyn Ballinger – 15 years
Oleta Bigler – 15 years
Sarah Camden – 15 years
Wanda Furney, RN – 15 years
Laurie Gilliland – 15 years
Carolyn Kitchens, RN – 15 years
Michelle LeBlanc, RN – 15 years
Deborah Norton – 15 years
Doris Sebert, RN – 15 years
Melinda Spauding – 15 years
Jann Waters, RN – 15 years

Case Managers 1993-1995 to present

Glenda Bivins, Ability Resources
Paula Blanton, Ross Health Care of Chickasha
Mary Cox, Country Style Health Care IV
Robert Groth, LIFE Senior Services
Stephanie Hope, OU-College of Nursing
Margaret Paveletich, Ability Resources
Kristy Wellstead, LIFE Senior Services
Sonia M. Young, Oxford Health Care
December 2012 marked the retirement of one of the ADvantage program’s early authors and advocates — Mike Lester, Ph.D. Lester’s career achievements left a substantial positive imprint on health care in Oklahoma and earned him the Aging Services 2013 Lifetime Achievement in Aging Award and the dedication of the ADvantage Administration’s training room in his honor.

“Our daughters motivated Jane and me to become lifelong advocates for persons with disabilities.”

Lester and his wife, Jane, met as VISTA volunteers in Florida. They married in 1972 and had two sons. In the early 1980s, they expanded their family and adopted two daughters through Maryland Social Services. Both daughters had special needs — one with physical disabilities and serious medical problems and the other with Asperger’s syndrome.

Lester has a background in psychology and his early career was in medical research. He moved to Tulsa in 1986 to work at Children’s Medical Center and operated electroencephalograms, searching for abnormalities and relating them to particular dysfunctions. “It was good, but I was looking for something different,” he said.

Lester’s family inspired him to make improvement of long-term services and supports a career. “Our daughters motivated Jane and me to become lifelong advocates for persons with disabilities,” said Lester. They also inspired him to “change careers from medical research and diagnostics to helping create better service delivery systems for persons needing long-term services and supports.”

In 1991, Lester started his career in social services at the Long Term Care Authority of Tulsa where he researched the types of case management and services to offer in the ADvantage program. His team produced an 80-page document called “Conceptual Foundations (Continued on page 7)
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for a Long-Term Care Service Delivery System” and from that, the ADvantage waiver program was born. “It had a lot of good input from a lot of people, and I think that really was a lot to do with ADvantage being successful,” Lester said.

“During the next 25 years, he served as a research director and, at various times, head of Information Technology. He also served as a liaison with DHS and the Oklahoma Health Care Authority. “I basically was the main author of the ADvantage waiver and helped maintain it,” he said. “I was involved in all those processes, including the initial determination of rates for services and, after that, rate increases to help fund the providers to deliver the services throughout the state.”

When Lester started with the ADvantage program, there were three employees and only 36 clients. “When we started, we served just three ZIP codes in Tulsa County in 1993.”

Prior to the ADvantage program, nursing homes were the only option for people who needed that level of care. Now, the number of people in nursing homes is flat or declining, although the number of people who are reaching their senior years is increasing. “We claim that a lot of that is due to ADvantage being offered throughout the state, and without ADvantage, people would be going into nursing homes.” The ADvantage program is also less expensive than nursing facility services. “It’s about 40 percent of the cost of residing in a nursing home, so ADvantage saves the state a considerable amount in Medicaid costs,” he said.

While building ADvantage, his team also modeled agency care for State Plan Personal Care. Before ADvantage, it was the only in-home, long term care service in the state offered for the Medicaid population. “It was innovative when it first started in 1970,” he said. “Oklahoma was the first state to have Medicaid-funded personal care.”

The State Plan Personal Care program still exists and assists thousands of individuals, including children and the elderly. “We transformed and improved that program as part of our work on ADvantage,” Lester said. Norma Goss, retired, was the program administrator for many years and she was very involved in developing the program throughout that time. “It was a needed service. At the time, 40 states had this kind of waiver but Oklahoma did not,” Lester said.

By 1998, ADvantage provided services throughout Oklahoma and now the ADvantage program serves more than 20,000 people per year. “We help them remain in their homes and not have to be placed in a nursing home,” Lester said. “It is a great benefit to the families and the people that we serve. The Members can remain in the home with the services and the community.”

Lester also helped write two grants that were funded in the amount of about $2.3 million in 2005 and 2006.

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The grants helped ADvantage design the self-directed services option and design and fund the Electronic Visit Verification time and attendance tracking system. Both of which are operational today.

Lester earned a Ph.D in developmental psychology from the University of Connecticut. His thesis explored brain measurements in relation to cognitive development. He received a bachelor’s degree in psychology from the University of North Carolina – Chapel Hill. He grew up in an Air Force family, attending high school in Clinton, Md., and also lived in Texas and Alaska. His mother’s family is from Oklahoma and he has many relatives here. However, he has worked from Jefferson City, Mo., since 2002, via telephone and Internet. Lester continues to serve as a consultant for DHS through Long Term Care Authority of Enid.

Lester likes volleyball and is involved in a number of boards for the Jefferson City planning and zoning board and environmental quality board. He said he is the only Oklahoma state employee who was also a commissioner for another state’s capitol. His volunteer activities include being a Court Appointed Special Advocate (CASA) and supporting the Nutrition, Environment, Energy and Economic Development (NEEED) — a recycling organization with visionary goals.

History of the ADvantage program

The ADvantage program is a Title XIX Medicaid waiver that provides frail, elderly adults and adults with disabilities an alternative to care in a nursing facility. The program provides services which allow Medicaid-eligible persons who need nursing-facility level of care to remain at home or in the residential setting of their choice while receiving the necessary care.

In an effort to offer relief during the Great Depression, President Franklin Roosevelt signed the Social Security Act. Although the Act was made up of 11 major titles, the term "social security" most commonly came to refer to Old-Age, Survivors, and Disability Insurance. In 1965, President Lyndon Johnson signed the Medicare and Medicaid bills into law.

Prior to the 1980s, the only option for Medicaid beneficiaries who required long-term care services was institutionalization in a nursing facility. In 1981, Congress authorized the waiver of requirements of Title XIX of the Social Security Act to enable states to provide home and community-based services (HCBS) to individuals who would otherwise require Medicaid-reimbursed institutional care. Each state was then given the autonomy to create a program that was customized to the needs of its citizens.

The ADvantage program was designed as Oklahoma’s initiative to address the issue of long-term care for individuals requiring assistance. A crisis with the Oklahoma state Medicaid budget in the early 1990s prompted a serious look at more cost-effective ways to provide Medicaid services to eligible citizens. Since the cost of nursing facility care was a significant contributor to the budget crisis, less costly

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alternatives to providing long-term care services were considered. The Oklahoma Commission for Human Services, the governing body of the Oklahoma Department of Human Services, contracted with the Long Term Care Authority of Tulsa (LTCA) to develop long-term care reform proposals. A task force of more than 40 individuals, advocates, service providers and funders worked to design a community-based system of long-term care. By 1993, the partnership recommended, and the Commission approved, the creation of the ADvantage program through a Section 1915(c) waiver of the Social Security Act. Such a waiver allows the use of Medicaid funds to purchase in-home, long-term care instead of more costly nursing home care.

On July 9, 1993, the Centers for Medicare and Medicaid Services (CMS) formally approved the ADvantage waiver and, in November 1993, the ADvantage program began as a pilot program in Tulsa County. By 1995 it expanded to five counties and then expanded statewide in 1997. During the first fiscal year, the ADvantage program served 36 individuals. Today, more than 20,000 Oklahomans receive services through the ADvantage program every year.

Two additional service options have been implemented to better serve ADvantage program Members. In 2005, the ADvantage program offered the Consumer-Directed Personal Assistance Services and Supports (CD-PASS) service option. CD-PASS offers Members the opportunity to make and direct decisions regarding personal care services. Members can recruit, hire, train and supervise their personal service assistant. The CD-PASS option is currently available in Tulsa, Rogers, Creek, Wagoner, Osage, Pittsburg, Canadian, Cleveland, and Oklahoma Counties, with plans to expand into additional counties.

In 2009, the Assisted Living service option was added, allowing individuals who reside in assisted living facilities to receive ADvantage services. There are six facilities statewide offering the assisted living service option.

The ADvantage Administration (AA) was formed Oct. 16, 2008, as a result of the administrative responsibilities being transitioned from LTCA of Tulsa to DHS. Since that time, several enhancements have been implemented to better utilize Medicaid funds and improve service for our Members. The interactive voice response authentication (IVRA) system, AuthentiCare, was added in November 2009. The SmarterMail email service allows a secure way for ADvantage Administration and providers to communicate. Legislation was passed to increase reimbursement rates for many of the core services. Changes to policy have increased the number of authorized units for adult day health.

With its history of success and promise for the future, we look forward to the next 20 years.
A partnership from the beginning

In 1993, the state of Oklahoma was granted a waiver to provide Medicaid services to adults who were aging or disabled to remain in their homes and communities. Four provider agencies have been with the ADvantage program since its inception, either involved with its development and/or providing services to its Members.

The original agencies were Ability Resources, LIFE Senior Services, Girling Health Care and Oxford Health Care. Representatives of each agency were contacted and asked two questions:

1. What prompted your agency to be involved with the initial development of the ADvantage program?

2. What are the best changes you have seen in this program since it started?

Ability Resources

Carla Lawson, Executive Director with Ability Resources, responded, “At the time the ADvantage program was being designed, there were individuals with significant disabilities serving on Ability Resources’ board and working as staff. They knew what services were available in the community and had a clear understanding of what services were needed for individuals with disabilities to participate fully in community life. They had a passion for the independent living philosophy that emphasizes consumer control and believed that people with disabilities are the best experts on their own needs. So who better to help design programs for people with disabilities than people with disabilities? I think the CD-PASS option is the best change to the program as it supports the members’ right to direct their own care. It offers greater flexibility and freedom of choice, thereby maximizing members’ independence.” She added, “The early days – pre HCBS – were extremely hard for people with significant disabilities who struggled to live in the community. I don’t think I truly appreciated all their sacrifices at the time.”

“Who better to help design programs for people with disabilities than people with disabilities?”

LIFE Senior Services

Amanda Summers, Director of Development for LIFE Senior Services shared LIFE’s background with the ADvantage program. “Around 1994, Dr. Karns with Long Term Care Authority, recommended that LIFE Senior Services be chosen to pilot the ADvantage program for the region. The ADvantage program aligns with LIFE’s mission to keep seniors living independently and at home for as long as possible, so LIFE was a natural fit for the program’s objectives. Both entities also work to connect seniors with home and community-based services to help ensure that people are getting quality health care affordably. Knowing that they could serve the community in a greater capacity, LIFE welcomed the opportunity to become involved with the initial development and

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“Every person has the right to age with dignity and purpose, regardless of financial ability.”

Nora Burns, ADvantage case management supervisor, has been with LIFE for 25 years and had the very first ADvantage program client. In visiting with her about the ADvantage program, she recalls how robust the program has become over the years. When LIFE was chosen to pilot the ADvantage program, for example, only three case managers were assigned to the program – Nora being one of them. Today, LIFE has 12 case managers working with the ADvantage program. The services provided have also evolved over the years to encompass a more comprehensive, wrap-around approach to care today.

“In its beginnings, the ADvantage program offered personal care services as well as nutrition services to three ZIP codes. Pharmaceuticals were paid for, but were capped at six medications. Twenty years later, the program has expanded its reach to the entire state and has grown to include many more services and benefits that keep seniors independent and living at home. Medications are no longer capped, durable medical equipment is paid for, the client’s environment is modified, if needed to keep them safe; the list goes on. LIFE Senior Services and the ADvantage program have adapted to the evolving needs of the people they serve by identifying what elements are needed for people to maintain their independence and quality of life, and finding a way to provide quality care regardless of financial means. At LIFE, we believe that every person has the right to age with dignity and purpose, regardless of financial ability, and the ADvantage program reinforces that principle.”

Girling Health Care

Tim Brittingham, Regional Manager for Girling Health Care, stated, “Since 1967, Girling Health Care has understood the importance of giving patients the opportunity to benefit from home-based services. By sharing our successful experiences and knowledge of Medicare and Medicaid programs, we wanted to contribute to a program that would provide a comprehensive approach to home care for Oklahomans. We saw ADvantage as the right option

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Did You Know?
2013 Average Annual Cost Per Person
ADvantage: $8,867
Nursing facility: $28,167
Partnership
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for Oklahomans who wanted to remain at home with the right supports.

“ADvantage has grown into an important service option for many who receive Medicaid. As ADvantage has grown, so has the importance of the program to respond more quickly and effectively to the changing climate of Member needs. Information exchanges between the administrative agent and providers have become more formalized and are beginning to maximize the use of technology. Led by the ADvantage Administration, trainings for provider agencies have increased in content and in frequency, fostering an open dialogue to better service Members. Working together, provider agencies and the state have created a strong alternative to nursing home placement for Oklahomans who want to remain at home.”

Oxford Health Care

Patty Holderman, LCSW and Director for Long Term Care at Oxford Health Care, said, “The mission of Oxford Health Care was from the beginning and continues to be to improve the quality of life for elderly and disabled Oklahomans. Oxford has been an active partner in the ADvantage program from the start, because we believed the mission of this program aligns with ours and enables thousands of Oklahomans to remain in their own homes with available supportive services.”

When asked about what are the best changes she has seen in this program, she responded, “Expansion of the program state-wide. Collaborative nature of public-private partnership to more effectively deal with the needs of members.”

New Medicaid Services Unit

2013 brought change to the structure within Aging Services. With the retirement of two key individuals, Tom Dunning and Mike Lester, Aging Services Director Lance Robertson announced the merging of the Home and Community-based Services Unit (HCBS) with the ADvantage Administration (AA) under singular leadership of a division programs director into the newly titled Medicaid Services Unit. In May 2013, Megan Haddock assumed the role of Medicaid Services director.

According to Robertson, “This important position will oversee the combined units, bearing chief responsibility for the on-going success of the ADvantage program and our long-term care efforts. Additionally, the position will work to strengthen critical relationships for the betterment of the program, focus on creating an aggressive and sustainable vision for the unit and program, and provide leadership on behalf of the division at the local, state and national levels.” Haddock joined DHS Aging Services in June 2009 as programs administrator of the AA. She holds a juris doctorate from the University of Tulsa and is active in all levels of leadership related to the state’s Medicaid efforts.

In September, Carmen Ross of Broken Arrow was selected as programs administrator of the MSU AA. She is an experienced leader who has worked in multi-faceted environments and will bring creativity, energy and strong administrative skills to this position within Aging Services. She holds a Bachelor of Science in international and area studies from the University of Oklahoma and a Master of Social Work from Baylor University. Her experience includes working in the areas of state/federal eligibility assessment, policy development and review, federal program and contract management, mental health and substance abuse treatment, grant writing, and community relations.