**Member Spotlight:**

Margo Young

It is rare to find a family whose surname suits them as perfectly as it does the Young family. Margo Young, a new ADvantage Member in her mid-40s, and her mother, Judy Young, who is Margo’s primary caregiver and past retirement age, could each easily pass for a decade younger. Even Layla, their 4-year-old Jack Russell terrier/greyhound mix, has moments that are

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**Oklahoma Conference on Aging**

The 40th Annual Oklahoma Conference on Aging will be May 5-7 at the Embassy Suites Norman Hotel and Conference Center.

“The conference is a wonderful opportunity to celebrate Oklahoma seniors and showcase resources,” said Lance Robertson, DHS-Aging Services director. “Every year, I look forward to the chance to learn new things, renew friendships and meet new people interested in aging issues.”

Senior Day, May 5, is free to Oklahomans age 60 and older. Guest emcee, Jayne Jayroe-Gamble,

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pure puppy. After just a few moments in their home, it becomes obvious that the Young women are still young women because of their attitudes — a joyous, laughter-filled, somewhat irreverent look at a life in which they adamantly refuse to be victims, a life so full of possibilities that there is no room for anyone’s pity and certainly not for self-pity.

The two have lived together for a little over a year. “We get along pretty good,” Judy said, with a big smile. “We have a good time together.”

“We have a blast!” Margo chimed in. “We just need another woman and we’ll be the ‘Golden Girls.’”

Mother and daughter do have a lot in common. Both are single mothers with one son and one daughter each. (Margo’s older brother lives in Oklahoma City, as does her 18-year-old daughter who is attending college. Her 22-year-old son is in the last stages of preparation to enlist in the U.S. Air Force.) Both women had also been on their own for some time prior to becoming roommates, and both have faced hardships. And, of course, there is the above-mentioned sense of humor.

But, there are differences, too. Judy’s father was in the U.S. Air Force, so she traveled all over the world. She lived in Japan, “The Japanese people are so humble and kind; just wonderful to be around!” And in Africa, “The people are so very different from us, from our lifestyle. It would have been difficult if I had been older … been a teenager. But for a kid, it was great … summertime all the time!” Judy indicated that she had received a very good education, both at the military base schools she attended around the world and from the travel experience itself.

Margo, on the other hand, has lived in Oklahoma her entire life. She was born in Oklahoma City. “She came out kicking and raring to go,” Judy chuckled, “and she has been that way ever since.” Margo was very physically active, loving things like roller skating, but she never really into team sports. Margo attended Bishop McGuiness High School in Oklahoma City. She moved to Tishomingo, where she has extended family, when her daughter was a baby and started college there. “I took every course I could that had to do with business,” she said. Margo moved to Tulsa in 2006 because “it was time for a change in people, places and things.” She recently completed her AA degree at Tulsa.

“I look young; I look healthy. I don’t look disabled. People are always surprised when they first meet me. I feel like it’s my opportunity, and my pleasure, to educate people about lupus.”

— Margo Young
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Community College, and her case manager is going to recommend some education programs available for individuals with disabilities. Margo wants to study interior design and is looking forward to taking art classes at an adult day health.

Layla plans to continue her education, as well. She will soon be starting service dog training school. She is already a very well-trained dog and very intelligent, which she demonstrates willingly by greeting guests with a friendly, “Hello.” According to Margo, Layla has a 17-word vocabulary including “no,” “mama,” “I want one,” “I love you,” and “I love Layla.” It is clear to all observers that Layla is a very important part of the family, and this special training will enable her to be of even more assistance to Margo.

Lupus is a chronic inflammatory disease that occurs when a body’s immune system attacks itself, and it is one of the primary reasons Margo receives supportive assistance with ADvantage services. Consistent with Margo’s overall positive approach to life, she has responded to news of her condition by taking every opportunity to educate others who have developed the disease. Researchers are beginning to believe that there may be a genetic predisposition that results in the onset of the disease. “Although no two cases of lupus are alike, there are symptoms — things that a person with lupus feels or experiences, as opposed to a doctor testing for — that many with the disease notice.” Margo is eager to share from her personal experience with this chronic illness in the hope that it might help bring some relief or comfort to others as they adjust to the challenges that the illness brings to their lives. http://www.lupusla.org/about-lupus/lupus-symptoms.php

Looking back on the complex and convoluted set of circumstances that occurred to create her current health issues, Margo has taken to buying the occasional lottery ticket. “What were the odds of all those factors happening just in the right order? I’m trying to turn that luck from a negative to a positive. It’s time to flip that omelet!”

Margo worked in sales all of her life. She liked selling and was good at it. She was selling battery backup systems, from some as small as a shoebox, up to the ones that can power St. Francis Hospital during a blackout. In 2009, she sustained a back injury on the job which caused a bad lupus flare-up. It was then that she faced the realization she wasn’t going to be able to keep working.

A little over a year ago, she knew it was no longer practical or safe for her to live alone, so she and Judy combined their households. Judy is a great deal of help to Margo and the companionship has been invaluable, but she could see that taking care of her was becoming too much for her mother to do alone. While in the hospital recovering from her back surgery, she got on the Internet to see how much a home health aide would cost. That’s how she discovered the ADvantage program. Margo started the application process last September. Originally, she was denied.

In December, a ground floor apartment became open in the small complex where Judy used to live. It’s a light and airy open floor plan, close to the laundry and an area where Layla can run. On the last day of moving, Judy fell and broke her hip, leading to a five-day hospital stay and rehab. Margo called her DHS case worker about the denial, and there appeared to have been a processing error. The application was resubmitted, and, this time, she was approved. A case manager (CM) came out almost immediately.

The day before this interview, Margo received

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word that her plan had been authorized and her services would start very soon. Margo has not yet met her personal care assistant (PCA), but she loves her CM. “I’d like to just keep her in my pocket,” she giggles, “she is just the sweetest, nicest person.”

When asked what she hoped to get from ADvantage, Margo thought for a moment, then replied, “A person from the outside to come into my home who has my best interest at heart, and who I expect will eventually feel like part of the family. I hope she will be someone who I can get support from mentally and emotionally, as well as physically. I look forward to having someone who can go with me and help me do the shopping and the laundry. I don’t make friends easily anymore ... I’ve been used and abused and just got friended-out. This girl will be a friend who has to come because she’s getting paid.”

“We know we won’t be able to live here forever,” Judy spoke up. “Eventually, it will be too much for us, even with help, and we will have to go back to Oklahoma City where Margo’s dad and brother and my sister and the cousins live. But we’re going to stay here and take care of ourselves as long as we can!”

“We’re very grateful for the ADvantage program,” Margo added. She paused for a moment, her face growing serious. “I have joy in my life. I’m not a religious person, but I am very spiritual, and I have genuine joy in my life. But the hardest part of having lupus is that it’s so unpredictable. I have plans, and then it flares up. That’s what gets me frustrated and a little depressed sometimes — the inability to make and keep plans for my life. I get frustrated having to stay in bed; it makes me angry. My brain is going and going, and my body can’t keep up.” Margo sighed and shook her head a little, as if trying to clear out the negative thoughts. “But you know what helps? I have a doctor who is very well-versed in lupus, who listens to me and is genuinely concerned for my well-being.” She paused again. “I look young; I look healthy. I don’t look disabled. People are always surprised when they first meet me. I feel like it’s my opportunity, and my pleasure, to educate people about lupus.” The smile came back, and with it that glass-half-full attitude that helps to keep the Young women so young.

Inside the Aging Services OKC Office

While the DHS Medicaid Services Unit (MSU) ADvantage Administration offices are located in Tulsa, the majority of the DHS-Aging Services offices are in Oklahoma City at 2401 N.W. 23rd St., Ste. 40. Aging Services includes nine units:
• Executive Unit
• Legal Services Developer
• Operations Unit
• Medicaid Services Unit
• Community Relations Unit
• Office of the State Long-Term Care Ombudsman
• Special Unit on Aging
• Contracts and Coalition Unit
• IT Unit and Consumer

Engagement and Information Unit

The Executive Unit

While assuming overall responsibility for the effective (Continued on page 5)
functioning of Aging Services and serving as first point of contact with the rest of the agency, the Executive Unit also handles space management, mall relations and business continuity planning.

The Executive Unit consists of the division director, the legal services developer and the assistant to the director.

**Operations Unit**

This unit and its staff contribute to the overall successful performance of Aging Services by providing division-wide administrative, human resources, fiscal and policy services that support both internal and external customers. Programs Administrator Stacy Gholson oversees the Operations Unit, whose staff members provide support to a myriad of areas including Budget and Finance, Contracts and Purchasing, Front Desk Customer Service and Lobby Reception, Human Resources and Personnel, Policy and Strategic Planning, and Secretarial and Administrative Services and Programs.

**Community Relations Unit**

This unit coordinates Aging Services’ internal and external communications, including publications, outreach and media. The CRU is responsible for planning and implementing the annual Senior Day at the Capitol and the Annual Oklahoma Conference on Aging. The CRU also heads up the division’s grant activities, including grant research, application and grant management. The unit is also responsible for coordinating the division’s family caregiver initiative (which includes grandparents raising grandchildren) and internal staff training efforts.

**Office of State Long-Term Care Ombudsman**

Bill Whited is the current State Long-Term Care Ombudsman. This position is required by federal law and is administered by Aging Services under the authority of the Older Americans Act and the Oklahoma Long-Term Care Ombudsman Act.

The ombudsman program serves residents in Oklahoma long-term care facilities including nursing facilities, assisted living, residential care homes and continuum of care. Ombudsmen investigate complaints on behalf of residents and provide advocacy for the residents, with the goal of improving quality of care and quality of life. The ombudsman program is supported by local staff and volunteers committed to improving and enriching the lives of residents age 60 and above in long-term care settings. The Area Agencies on Aging provide local supervision and support for the volunteers and additional support is provided by Office of the State Long-Term Care Ombudsman.

**Special Unit on Aging**

Beth Batman, programs administrator, is the primary manager of the unit and oversees administration of the OAA Title III Program statewide. DHS ASD is the designated State Unit on Aging (SUA). As a part of the SUA, the SUA’s primary function is to administer Older Americans Act (OAA) programs in the state of Oklahoma.

**Contracts and Coalition Unit**

Eleanor Kurtz is the program administrator for the Contracts and Coalitions Unit, which is made up of the Adult Day Services Program (state funds only); the Lifespan Respite Grants (two
of them); the Corporation for National and Community Services Volunteer Programs (Foster Grandparents, RSVP and Senior Companion Programs) and the Federal Transit Administration’s Section 5310 Transportation program for “Enhanced Mobility for Seniors and Individuals with Disabilities.” All of the programs in this unit are to assist people in remaining active members of their communities, and support caregivers and other programs that might make that independence possible.

**IT Unit and Consumer Engagement and Information Unit**

Gerald “Ronnie” Combs is the Program Process Administrator for the Aging Services Information Technology Unit. This unit provides support in the development and use of information technology for the employees and advocates of Aging Services and actively engages and supports all members of the Aging Services family in the use of information technology in support of their daily work. Additionally, this unit creates and maintains partnerships between the Aging Services IT Unit, other divisions of DHS, and external partners for the development of new and enhanced technologies and services.

**Consumer Engagement and Information**

Karen Poteet, programs administrator, provides leadership for the Consumer Engagement and Information unit. The Aging Services Consumer Engagement and Information Unit (CEI) is the designated lead of Oklahoma’s Aging and Disability Resource Consortium (ADRC). The ADRC works to streamline access to long-term support and services (LTSS) which assist Oklahomans over the age of 60 and those who are physically, intellectually or developmentally disabled of any age in making informed decisions about their service and support options. The ADRC coordinates existing systems of information, assistance and access to LTSS. The CEI Unit also serves as the DHS contract monitor for 2-1-1 Oklahoma services and provides administrative support to the 2-1-1 Coordinating Council.
Aging Conference
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author, broadcaster and former Miss America, will lead a keynote panel.

Professional Days are May 6-7 and provide development for professionals, students and advocates.

Featured speakers will be Kathy Greenlee, assistant secretary for aging; Kerry Hannon, AARP’s Jobs Expert, columnist, award-winning author; Don Blandin, president and CEO, Investor Protection Trust (IPT); and Irving L. Faught, administrator, Oklahoma Securities Commission.

The conference offers six hours of supervisory training credit for May 6 and five hours of supervisory training credit for May 7. To be granted CEU, attendees must be present for the entire session, get the facilitator’s signature at the end of the session, and turn in a completed attendance sheet to the staff person at the registration desk in exchange for a certificate of completion.

Activities include meals, discover and wellness expos, 60 breakout sessions, the Mich Magness Film Festival, more than 60 exhibitors, a walking event, door prizes, and more.


Seniors enjoy the Wellness Expo at the 39th Annual Oklahoma Conference on Aging last year.
Senior Day at the Capitol

Oklahoma Senior Day at the Capitol was Feb. 23. At this free event for older Oklahomans and professionals in the field of aging, attendees learned about legislation and issues affecting older Oklahomans; shared ideas, needs and concerns with state senators and representative; and visited with nonprofit and governmental agencies to learn about their services, according to http://www.okseniorday.com/

Speakers included Rep. Jadine Nollan, Sen. AJ Griffin, Dr. Terry Cline, DHS Director Ed Lake, DHS-Aging Services Director Lance Robertson and State Long-Term Care Ombudsman William Whited.
Senior Day
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Above and below, Senior Day at the Capitol attendees; at right, Director of DHS-Aging Services Lance Robertson.
Senior Day
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Clockwise from top left, Terry Cline, Ph.D.; an attendee looks over informative materials; DHS Chief Coordinating Officer Mark Jones; Rep. Jadine Nollan; and others who were in attendance.
Senior Day
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Clockwise from top left, Trish Emig, chair of the Oklahoma Alliance on Aging’s Legislative Advocacy Strategy Committee; conference attendees; DHS-Aging Services’ information booth; State Long-Term Care Ombudsman William Whited; and the OHAI booth.
Lance Robertson became the state’s director of DHS-Aging Services in August 2007. As director, he is responsible for an annual budget of $325 million (Medicaid — federal and state) and oversees 19 major programs, including the Older Americans Act program and the State’s Home and Community-Based Services Medicaid Waiver for people 65 or older, or adults with physical disabilities (ADvantage Program). He leads a statewide team of 270 staff members.

A career gerontologist, he was at Oklahoma State University for 12 years, where he co-founded the Gerontology Institute and contractually served as executive director of Partnerships for Aging, the largest regional gerontology association in the United States. He was the recipient of the 2004 Oklahoma Aging Professional of the Year Award, the Salute to Leaders in Aging National Award (Caregiver Category), and the national Care Heroes Professional Award. He was selected as the 2013 Honorary Alumni Award Recipient for the College of Human Sciences at Oklahoma State University.

Robertson’s bachelor’s degree is from Oklahoma State University, and he is currently pursuing a Master of Public Administration degree from the University of Central Oklahoma. Robertson is a graduate of The Governor’s Executive Development Program for State Officials and a member of the first class (1997) of the Oklahoma Aging Advocacy Leadership Academy. He is the immediate past president of the National Association of States United for Aging and Disabilities (NASUAD), the chief national authority on aging and disability issues.

He resides with his wife and two daughters in Edmond, Oklahoma.
CD-PASS Expanding Services

Remaining 49 Counties to be Added in 2015

CD-PASS is currently available in 28 counties, including the Tulsa and Oklahoma City areas, as well as the southeastern quadrant of the state, and will continue to expand until available statewide. Prior to each expansion, case management providers serving the affected counties will receive a bulletin from MSU-Tulsa advising of the expansion and trainings available for case managers. Every case manager and supervisor serving Members that select CD-PASS must complete Consumer-Directed Agent training (CDA/CM). Members will receive brochures in the mail when it is available in their area.

**Planned Expansions**

Effective May 1, CD-PASS will be available in 57 counties. CD-PASS is expanding to the following counties on May 1: Alfalfa, Beaver, Beckham, Blaine, Cimarron, Craig, Custer, Delaware, Dewey, Ellis, Garfield, Grant, Harper, Kay, Kingfisher, Logan, Major, Mayes, Noble, Nowata, Ottawa, Pawnee, Payne, Roger Mills, Texas, Washington, Washita, Woods, and Woodward.


**Assisted Living Expanding Services**

Assisted Living continues to seek additional providers for assisted living services. One assisted living facility in Craig County is currently completing the required certification and is anticipated to be placed on the Certified Agency Report for assisted living services by fall 2015. Case management providers in the area will receive a bulletin from MSU-Tulsa when this provider becomes available.
You have just received an ADv6g, and on it you see the dreaded words, “Not authorized: See attached SPR.” This means more work for everyone and can lead to service delays. Wouldn’t you love to know the “secret” to receiving a “clean” 6g each and every time? This four-part series, based on the criteria used by the ADvantage Clinical Review team, is designed to help remove the mystery from service plan authorization. In parts one through three, we covered what is expected in service plan goals regarding disease management, personal emergency response systems (PERS), personal care, advanced supportive and restorative assistance, respite care, nutritional supplements, and safety. In this fourth and final part, we look at:

1. Fall prevention - Address fall prevention thoroughly in goals:
   • Be detailed and Member-specific. Why is the Member falling? How does the disease process relate to falls, and what is being done to prevent them? Include fall-prevention steps. (Review the Case Manager Orientation Training Manual.)
   • If including the Fall Prevention brochure in goals, personalize it: Check items that apply, include a statement regarding the Member’s understanding and how that is verified, and have the Member sign the last page of the brochure. Include a copy of that page with the service plan goals.

2. Durable medical equipment - Include in goals:
   • ADvantage will pay; provider will deliver, install and instruct Member on proper use of item.
   • Submit a detailed explanation (justification) for items outside the norm.
   • If the request is for a replacement item, provide justification for the request.

Additional hints for preparing “SPR proof goals”:
• Paint a clear picture of the Member’s status/situation/environment and any special circumstances.
• Make certain the goals are clear, concise, organized and legible.
• Refer to the Case Manager Orientation Training Manual and Case Manager’s Tool Box for help.
• When in doubt, ask. Provider Questions is here for you!

If you use this series of articles as a checklist before submitting service plans and addendums, you will be on your way toward banishing those SPRs!
Our quality service journey has begun! Recently, DHS has developed quality standards for employees and has created an agency-wide workgroup to improve quality service throughout the agency. Our approach to quality service is being modeled after the Disney Institute. The approach includes focusing on customer service as we traditionally know it, developing and implementing quality standards, improving employee engagement and satisfaction, enhancing quality business processes, and listening to customers. Both internal and external quality service are of utmost importance. This means that we will also be focused on the quality of service amongst staff and between divisions. Full implementation of quality service will result in a positive and productive work environment for us all and improved service delivery to clients.

Aging Services and Human Resource Management are the pilot divisions for implementation of the quality standards. Aging Services was chosen and agreed to serve as a pilot division for quality service, since it has long been a priority of the division to continuously improve customer service, which is a key component of the new quality service approach. The quality standards for the agency are safety, integrity, professionalism and compassion. Each of these standards brings with them specific behavioral expectations that we will all be holding ourselves, and each other, accountable to, including our agency leadership. The behavioral expectations include things such as reporting safety concerns immediately, saying what we mean and meaning what we say, being honest, being responsive to requests and needs of customers and partners, projecting a positive attitude and image, being accessible to others during work hours, striving to exceed customer expectations, listening attentively, treating others with respect, and challenging prejudices. This is not a comprehensive list, but it is enough to give you an idea of what quality behavior means.

These standards will be built, eventually, into the performance management process. The quality service team for the agency is working now on a communications plan, ideas for rewards and accountability, and other ways to bring the concept of quality to life within the agency.

“Quality standards for the agency are safety, integrity, professionalism and compassion.”