



Money Follows the Person Sustainability Plan

Idaho Home Choice

October 18, 2018

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Executive Summary

Idaho Home Choice (IHC) is Idaho's Money Follows the Person (MFP) Demonstration Grant.

Idaho was awarded an MFP Grant in March of 2011 and implemented the program in October of 2011. IHC offers two demonstration benefits to those individuals living in institutionalized care to help them transition to the community. They can receive 72 hours with a Transition Manager and up to \$2,000 of one-time Transition Services Money. The Sustainability Plan is a policy document meant to guide the continuation of the two demonstration benefits afforded by the IHC in ways that preserve and enhance the rebalancing efforts of Idaho Medicaid.

The plan was preceded by over a year of research and assessment devoted to the sustainability options available to maintain the program after the demonstration grant funding was expended.

The Bureau of Long Term Care developed the plan with extensive input from internal and external stakeholders including provider agencies, participants, advocacy groups, advisory councils, Medicaid subject matter experts, and other inter-departmental staff. The

Recommendations are:

1. Add Transition Services to the 1915(c) Aged and Disabled Waiver and the Adult Developmental Disability Waiver;
2. Add Transition Management to the Idaho Medicaid Benchmark Plan under the Enhanced Benefits section
3. Continue to identify systems barriers that prohibit participants from moving out of institutionalized care to the community.

Implementation is expected to occur on January 1, 2019, with Transition Services being available to all participants who qualify for one of the 1915(c) waivers and Transition Management for anyone who qualifies for the Idaho Medicaid Enhanced Benefit. These benefits will be available to those who currently reside in an institution and have been there for at least 45

consecutive Medicaid paid days beyond any Medicare Part A paid days if applicable. Additionally, Idaho utilized the Money Follows the Person Rebalancing fund to increase access to HCBS through the revision of the Uniform Assessment Instrument definitions. These revisions are projected to increase the utilization of HCBS by approximately \$6,000,000.00 per year.

Stakeholder Involvement

The Idaho Home Choice program has enjoyed a robust relationship with our stakeholders. Sustainability of the IHC program has been presented to internal and external stakeholders throughout the last year for feedback and revisions. The stakeholder groups agree that adding Transition Management to the Medicaid Benchmark Benefit Enhanced Plan and Transition Services to the 1915(c) waivers would continue to assist individuals who have a possibility of being institutionalized for an extended amount of time leave institutionalized care and move back into the community. Stakeholders agreed this would help Idaho continue to rebalance its long-term care spending. The following stakeholder groups were involved in the development of the sustainability plan. Several meetings were held with each group.

Stakeholder Membership: Personal Assistance Oversight Committee Ali Fernandez, Facilitator, Bureau of Long Term Care, Medicaid		
Name	Stakeholder Type	Agency/Office
Kevin Thorson	Participant	Personal Assistance Oversight Committee
Lisa Martin	Participant	Personal Assistance Oversight Committee
Tracey Thompson	Participant	Personal Assistance Oversight Committee
Dana Gover	Participant	Personal Assistance Oversight Committee
Tracy Martin	Participant	Personal Assistance Oversight Committee
Deborah Mehraban	Participant	Personal Assistance Oversight Committee
Trisha Taylor	Participant	Personal Assistance Oversight Committee
Hellenmerie (Rei) Walker	Participant	Personal Assistance Oversight Committee
Jim Vercreyssen	Provider Agency	Comfort Keepers
Hope Brackett	Provider Agency	Emeritus at Juniper Meadows
Karen Raine	Provider Agency	Best Home Care & Staffing
Sharon Anitok	Provider Agency	Multicare

Brett Waters	RALF	Qualicare, Inc.
Cathy McDougall	AARP-Idaho	Association for Advancement of Retired Persons
Dean Nielson	Center for Independent Living	Life, Inc.
Gwen Wilson	Personal Assistant	Independent contractor or is this information unknown?

Stakeholder Membership: Medical Care Advisory Council, Tom Fronk, Chair,

Name	Stakeholder Type	Agency/Office
Yvette Ashton	Medicaid Participant	
Amber Mausling	Disabled Community Representative	Living Independent Network Corporation
Jeff Weller	Aged Community	Idaho Commission on Aging
Courtney Holthus	Disabled Community Representative	Disability Rights Idaho
Cathy McDougal	Aged Community	AARP
Katherine Hansen	Provider Agency	Community Partnerships of Idaho
Kara Craig	Disabled Community Representative	Idaho Quality of Life Coalition
Kris Ellis	Skilled Nursing	Idaho Health Care Association
Toni Lawson	Hospitals	Idaho Hospital Association
Katherine Forstie	Medical	Idaho Medical Association
Tom Fronk	Primary Care	Idaho Primary Care Association
Cory Lewis	Physical Therapy	Idaho Physical Therapy Association
Paula Barthelmess	Mental Health	Mental Health Providers Association
Pam Eaton	Pharmacy	Idaho State Pharmacy Association
Rep. Fred Wood	Government	Idaho House of Representative
Sen. Lee Heider	Government	Idaho Senate
Tina Bullock	Tribal Representative	Nimiipuu Health – Nez Perce Tribe
Elke Shaw-Tulloch	Public Health	Department of Health and Welfare
Rep. John Rusche	Board Certified Physician	Idaho House of Representatives.

Idaho Home Choice Advisory Council, Debra Ransom, Chair

Name	Stakeholder Type	Agency/Office
Debra Ransom	Licensing and Certification	Department of Health and Welfare
Jeff Weller	Aging Community	Idaho Commission on Aging
Eric Kingston	Housing	Idaho Housing and Finance Association
Robert Vandemerwe	Skilled Nursing	Idaho Health Care Association
Christine Pisani	Disability Community	Idaho Council on Developmental Disabilities
Bart Larsen	Provider Agency	Quali Care, Inc.

Idaho Home Choice Workgroups

Name	Stakeholder Type	Agency/Office
Aaron Thain	Provider Agency	AAA Homecare
Brian Dale	Housing	Idaho Housing and Finance Association
Chris Johnson	Provider Agency	Human Service Alliance
Dana Gover	Participant/Disability Advocate	Northwest ADA Center
Dean Nielson	Independent Living	Living Independently for Everyone, Inc.
Eva Blecha	Provider Agency	Certified Family Home
Fawn Bell	Medical	Nurse
Gwen Chavarria	Institution Representative	Southwest Idaho Treatment Center
Hope Brackett	Provider Agency	A Full Life Home Health
Jim Baugh	Disability Community	Disability Rights Idaho
John and Martha Tanner	Mental Health	Physician

Ken and Wanda Warden	Provider Agency	Certified Family Home
Mark Leeper	Independent Living	Disability Action Center
Mary Jo Butler	Disability Community	Disability Rights Idaho
Matt Wappett	Assistive Technology	University of Idaho
Patrick Blum	Independent Living	Disability Action Center
Robbie Barrutia	Independent Living	State Independent Living Council
Roger Howard	Independent Living	Living Independent Network Corporation
Shane Robinson	Provider Agency	Robinson and Affiliates DDA
Tim Voz	Mental Health	Department of Health and Welfare
Trina Balanoff	Assistive Technology	University of Idaho

Idaho’s Plan for Continuing Transition Support

The state of Idaho will continue to actively support moving persons out of institutions following the conclusion of its Money Follows the Person (MFP) demonstration program – Idaho Home Choice – by adding the demonstration benefit of Transition Services to the existing Medicaid 1915(c) waivers and Transition Management to the Idaho Medicaid Benchmark benefit plan under the Enhanced Benefits package. It is anticipated that transitions supported under MFP will end as of December 31, 2018 and that transitions supported through the state’s 1915(c) HCBS Waiver programs and Medicaid Enhanced Benefits will begin January 1, 2019.

The transition initiative will target individuals who are aged and disabled, those with physical disabilities, and individuals with developmental disabilities who:

1. Have resided in a Qualified Institution including, a Skilled Nursing Facility, an Institution for Mental Diseases (not including those between the ages of 22 and 64), or an Intermediate Care Facility for the Intellectually Disabled, for at least 45 consecutive days over and above any Medicare Part A stay;
2. Qualify for services and supports through the Medicaid Aged and Disabled Waiver, Adult Developmental Disabilities Waiver, and the Medicaid Enhanced Benefit Plan.
3. Require Transition Services provided by the waivers to safely and successfully transition from institutionalized care to Home and Community Based living in “Qualified Housing” as defined

by the HCBS setting rules. Qualified Housing may include, a person's own home, a family member's home, a home or apartment leased by the participant, a group home setting or a Residential Assisted Living Facility.

Medicaid State Plan Transition Management

An individual who qualifies for Transition Management will be eligible for up to 72 hours of Transition Management from a certified Transition Manager who will work one-on-one with the participant to assess their needs, develop a Transition Plan, and facilitate the delivery of needed services and supports. The Transition Manager structure will remain the same as the current Idaho Home Choice structure. Idaho Medicaid will continue to recruit and train a committed cadre of qualified Transition Managers from among the Medicaid Provider Agency Network. Training will be managed through an on-line training portal as well as annual trainings conducted by the Bureau of Long Term Care regional staff in coordination with the annual Medicaid Provider Training.

Waiver Transition Services

Transition Services are goods, services, and supports that are provided to the Idaho Home Choice participant for addressing identified needs, including improving and maintaining the participant's opportunities for membership in the community. An individual who qualifies for waiver Transition Services will be eligible for up to \$2,000 of one-time Transition Services funding for expenditures not limited to but including:

1. Security deposits and application fees necessary to lease an apartment or home;
2. Household items including furniture, meal preparation items, linens, etc.;
3. Assistive technology, and other items deemed necessary to promote health and safety and enhance independent living, and;

4. Moving expenses and one-time cleaning expenses.

A draft comprehensive list of eligible and non-eligible expenditures of Transition Services money has been developed and is included in **Attachment 6**.

Eligible individuals will have up to 365 days to utilize the Transition Management and Transition Services benefit. These benefits are summarized in **Attachment 1**.

Administrative Functions

It is anticipated that the following general administrative functions will be necessary to support Waiver and Medicaid State Plan transition activities:

1. Policy Oversight and Long-Term Services and Supports (LTSS) System Advocacy;
2. Quality Assurance and Quality Improvement;
3. Education and outreach;
4. Data management;
5. Training.

The Idaho Home Choice Program has been successfully imbedded into the Medicaid book of business. Policy Oversight and Long Term Services and Supports System Advocacy already occur at the Medicaid level through the Medical Care Advisory Council and the Personal Assistance Oversight Committee. Medicaid's waivers currently have proactive mechanisms to avoid quality problems, define performance measures to assess quality and identify priorities for intervention, specify how data will be collected to monitor program implementation, and embrace quality improvement. The performance measures address sub-assurances across waivers and populations served. The assurances are Level of Care, Service Planning, Qualified Providers, Health and Welfare, Financial Accountability, and Administrative Authority. Education and outreach will include revising the Bureau of Long Term Care "Home Care"

brochure to include the two additional Transition Benefits. Information about these two transition benefits will also be included in resources identified on the Bureau of Developmental Disability Services Adult Developmental Disabilities Care Management webpage and the Bureau of Long Term Care Home Care Webpage. Inter-departmental and intra-departmental training will also occur for all divisions affected by the addition of the Transition Benefits. Medicaid will continue to rely on the Medical Care Advisory Group and the Personal Assistance Oversight Committee to disseminate information. Data management will continue through the Molina system where the two Idaho Home Choice Transition Benefits are currently billed. Transition Management Training will occur annually in coordination with the Medicaid Bureau of Long Term Care Provider training and will be held regionally. These Administrative Functions are summarized in **Attachment 2**.

Demonstration Services

The chart below summarizes the two MFP Demonstration services that will be continued after the MFP grant funding ends. These are also summarized in **Attachment 3**.

Demonstration Service you Plan to Continue	Target Population	Specific Medicaid Authority - Waiver, SPA or Admin Funds Used	Staff who will Submit Amendment/Rules	Date for Amendment/Rule Draft Approval	Date for Waiver or SPA Amendment Submission
Transition Management	Elderly, Physically Disabled, Developmentally Disabled	Medicaid Benchmark Benefit Package Enhanced Benefit Plan	Alexandra Fernandez, Bureau Chief, Bureau of Long Term Care, Katie Davis, Program Specialist DHW	Draft submission will be October 1, 2018 for Idaho Medicaid Administrative approval and revisions made for an anticipated December publishing	Finalized draft Rule submission will be October 12, 2018 for an anticipated December Publishing
Transition Services	Elderly, Physically Disabled, Developmentally Disabled	1915(c) Waivers	Jennifer Pinkerton Medicaid Program Policy Analyst, Bureau of Long Term Care, Karen Westbrook Medicaid Program Policy Analyst, Bureau of Developmental Disabilities Services	Draft submission will be November 2018 for CMS approval or revisions for an anticipated December final approval	Finalized draft Amendment submission will be no later than March 31, 2019.

Administrative Staffing

The two Idaho Home Choice staff positions will not be funded after the demonstration ends as indicated by the chart below. This is also summarized in **Attachment 4**. Current Medicaid

Bureau of Long Term Care staff will conduct all business required for the two Transition Benefits.

MFP Staffing											
Job Function/ Title for Position Funded Through MFP	Number of FTEs	Location of Staff	State Employee or Contractor?	Will the Job Function Continue to be Funded Post-MFP?	Number of FTEs Funded Post- MFP	Where will FTEs be Housed ?	State Employee or Contractor?	Source of Funding for Position Post- MFP	Agency/ Division that will Secure Funding	Date to Commence Work to Secure Funding	Projected Date to Secure Funding
Idaho Home Choice Project Manager	1	Division of Medicaid, Bureau of Long Term Care, Boise Idaho	State Employee	NO	0	N/A	N/A	N/A	N/A	N/A	N/A
Idaho Home Choice Project Coordinator	1	Division of Medicaid, Bureau of Long Term Care, Boise Idaho	State Employee	NO	0	N/A	N/A	N/A	N/A	N/A	N/A

Idaho’s Plan for Using Rebalancing Funds

As a result of the MFP Demonstration, Idaho Medicaid has reviewed barriers that may be preventing individuals from transitioning from institutionalized care to Home and Community Based Care. One of the barriers identified was access to Home and Community Based Services. Through an ongoing collaboration with the Long Term Services and Supports Reimbursement committee, Medicaid reevaluated the Uniform Assessment Instrument’s (UAI) definitions and associated units/hours. The revised UAI more accurately identifies the hours necessary for caregivers to assist with night needs, medications, behavioral issues, and other tasks. This change will ensure parity between the community worker and the comparable facility worker to ensure quality of personal care services received in congregate and home settings. Maintaining a reimbursement methodology that guarantees the viability of personal care service providers

allows the State to recognize the reduced expenses of keeping participants in the community rather than in a nursing home. It is anticipated that these definition revisions will result in additional participants qualifying for waiver services as well as Personal Care Services through the Medicaid Enhanced State Plan Benchmark Benefit package. The annual projected cost is \$6,323,000 in Trustee and Benefits funds which includes \$1,896,900 in general funds and \$4,426,100 in federal funds. This will utilize all estimated Idaho MFP rebalancing funds for the duration of the grant.

Projected Timeline

Milestone/Major Activity	2015	2016	2017	2018	2019	2020
Submit Sustainability Plan to CMS	April 30					
Begin work on 2016 – 2020 MFP Budget	May 1					
Complete any revisions to Sustainability Plan if Applicable	June/July					
CMS Approves Sustainability Plan	August					
2016 – 2020 MFP Idaho Home Choice Budget Due to CMS	October 1					
CMS Approves 2016 – 2020 MFP Idaho Home Choice Budget and sends NOFA		January				
Submission of 2017 MFP Idaho Home Choice Supplemental Budget Request		October 1				
CMS approves MFP Idaho Home Choice 2017 Supplemental Budget Requests and sends NOFA			January			
Begin Official Project for IHC Sustainability			April 1			
Begin Negotiated Rule Making for the two Transition Benefits to be added into the 1915(c) waivers				June 1		
Begin waiver amendment work				July 1		

Submission of 2018 MFP Idaho Home Choice Supplemental Budget Request			October 1			
CMS approves MFP Idaho Home Choice 2018 Supplemental Budget Requests and sends NOFA				January		
Present revisions to IDAPA rules for approval to Idaho Legislative Session to take affect January 1, 2019					January-March	
Draft submission of 1915(c) waiver amendment posted for Public Comment 30 Days				August 1		
Draft Submission of 1915(c) waiver amendments to CMS for review				November		
Response from CMS on waiver amendment				November		
Revisions to 1915(c) waiver amendment per CMS request if applicable				November		
Submission of final 1915(c)waiver amendment to CMS				November 15		
Submission of Draft Temporary Rules to IDHW Administration				October 1		
Approval of Draft Temporary Rules				October 12		
Submission of 2019 MFP Idaho Home Choice Supplemental Budget Request				October		
Approval of final 1915(c) waiver amendment from CMS				December 15		
Temporary Rules publish in December Bulletin				December 5		
Last day to enroll participants in the MFP Idaho Home Choice Program				December 31		
CMS approves MFP Idaho Home Choice 2019 Supplemental Budget Requests and sends NOFA					January 1	
Transition Services begin as part of the Medicaid 1915(c)waivers					January 1	
Transition Management Begins as part of the Medicaid State Plan Benchmark Benefit					January 1	

Package under Enhanced Benefits						
Current participants continue to utilize their 365 days of MFP Idaho Home Choice benefits					January through December	
Submission of final 2020 MFP Idaho Home Choice Supplemental Budget Request					October 1	
CMS approves MFP Idaho Home Choice 2019 Supplemental Budget Requests and sends NOFA						February
MFP Idaho Home Choice staff finalize all MFP demonstration Program activities						January 1 through September 30
MFP Idaho Home Choice Demonstration Program officially ends						September 30

Idaho’s MFP Idaho Home Choice Estimated Budget Summary

Idaho is requesting \$11,065,258 to extend the Money Follows the Person Demonstration Program through September 30, 2020. This includes all costs including Demonstration and Home and Community Based Service costs. This will also include the development of comprehensive on-line training for Transition Managers in line with the efforts to sustain the training after the Demonstration Program has ended. Please see **Attachment 5** for budget summary details.

Conclusion

It has been an extremely rewarding experience to administer the Money Follows the Person Demonstration Program in Idaho. We currently have transitioned 544 individuals from living in institutions to living in the community and anticipate transitioning approximately 600 total participants before the demonstration ends. The quality of life for the participants who have transitioned continues to improve and we have identified and mitigated many barriers that

institutionalized individuals faced when trying to transition back into the community. Please accept Idaho's Sustainability Plan that outlines our efforts to continue to empower individuals to live in the least restrictive environment they desire.