

# Informing and Supporting New Participants in the Option of Participant Directed Services

Managed Long-Term Services and Supports (MLTSS) Subcommittee Meeting

September 6, 2023

Presented by: Marcus Hicks, Director of Service Coordination LTSS



**CARE IS THE HEART  
OF OUR WORK<sup>SM</sup>**

Delivering the Next  
**Generation**  
of Health Care

# Service Coordination Role in Self-Directed Model of Care



- The Service Coordinator meets with the Participant and completes the comprehensive needs assessment focusing on how long-term services and supports (LTSS) and community services can provide assistance to the Participant.
- Using the information collected during the comprehensive needs assessment the Service Coordinator and the Participant review the LTSS benefits that the Participant is eligible for to create the Person-Centered Service Plan (PCSP).
- When Personal Assistance Services (PAS) are reviewed with the Participant the Service Coordinator educates the Participant on agency and self-directed models of care.

# Personal Assistance Services

- The Service Coordinator reviews the benefits of both models (Agency and Self-Directed) with the Participant.
- The Service Coordinator will encourage the use of self-direction for various reasons including, but not limited to the following:
  - Participant interest in being able to self-direct the employment of their Direct Care Worker (DCW), including hiring, training, and firing.
  - Participant interest in being able to have greater influence and freedom over the development of their schedule and service delivery.
  - Geography that is historically difficult to staff PAS.
  - The Participant already has a caregiver that they want to formally hire as a DCW.
  - Once the Participant chooses the model of care that best fits their needs, the Service Coordinator works to implement the PCSP.

# How We Support Participant-Directed Services



- Appropriateness and effectiveness of the PCSP are reviewed with the Participant during each Plan of Care review.
- During the development and review of the PCSP, the Participant is educated on the option of self-directed care. This serves as a reminder to the Participant with an agency model, that self-direction is an option for them at any time, should they choose to switch.
- The Service Coordinator confirms the Participant's choice of preferred service model prior to the Participant signing the PCSP, with each review, which is subsequently mailed to the Participant to retain for their records.

# Upcoming

- We are including an article on Participant self-directed services in the next Participant newsletter.
- We are including Participant self-directed services as a topic in our Participant Advisory Committee (PAC) meetings, which are scheduled for September.
  - September 7<sup>th</sup> – Northwest
  - September 7<sup>th</sup> – Northeast
  - September 12<sup>th</sup> – Lehigh Capital
  - September 13<sup>th</sup> – Southwest
  - September 14<sup>th</sup> – Southeast

Thank you



Questions?

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# **Informing and Supporting New Participants in the Option of Participant Directed Services**

**MANAGED LONG-TERM SERVICES AND SUPPORTS (MLTSS)  
SUBCOMMITTEE MEETING  
SEPTEMBER 6, 2023**

**Olivia Martin, Sr. Director, Service Coordination & Long-Term Care  
Wanda Proteau, Manager, Operations**

# Service Coordination – Supporting New and Existing Participants

During new participant orientation, reassessments, or any encounter, for a participant who needs personal assistance services (PAS), the Participant Directed Option (PDO) model is discussed with the participant.

- ✓ Options provided for both PDO and agency
- ✓ PDO option allows the participant to have more independence choosing their employees, and scheduling the authorized hours.
- ✓ What barriers are there and what support is needed to self-direction?
- ✓ Schedule management, approving timesheets
- ✓ Does the participant have a direct care worker (DCW) in mind?
- ✓ Who are the informal supports?
- ✓ An effective backup plan to cover when a DCW is not available
- ✓ Working with the participant to evaluate scheduled hours
  - Number of DCWs
  - Awake hours
  - Quality of care





# ***Service Coordination Resources***



There are numerous ongoing training resources available to Service Coordinators (SCs)

- PA Health & Wellness (PHW) Job aid that outlines the PDO process
- Tempus job aids and resources
  - New Enrollment outline
  - Training documents and video available on the Tempus website
- Reporting distributed to our Service Coordination Entities (SCEs) Administrators/Subject Matter Experts
  - Monthly and weekly reports provided by Tempus on utilization practices
  - PHW training available for SCs

# Participant Overview

Once the participant decides that they wish to utilize PDO to support their PAS needs, participant understands:

- ✓ PDO means that the participant is the employer
- ✓ The participant will be approving timesheets
- ✓ The participant will be responsible for hiring, firing and training their employee(s)
- ✓ PDO is facilitated by Tempus, an external agency
- ✓ The Tempus referral form
- ✓ The participant is provided the website for Tempus
- ✓ Tempus training is available

What does “good to go” mean?

- ✓ Both the common law employer (CLE) and the DCW have provided all the necessary documentation.
- ✓ Authorization is in place



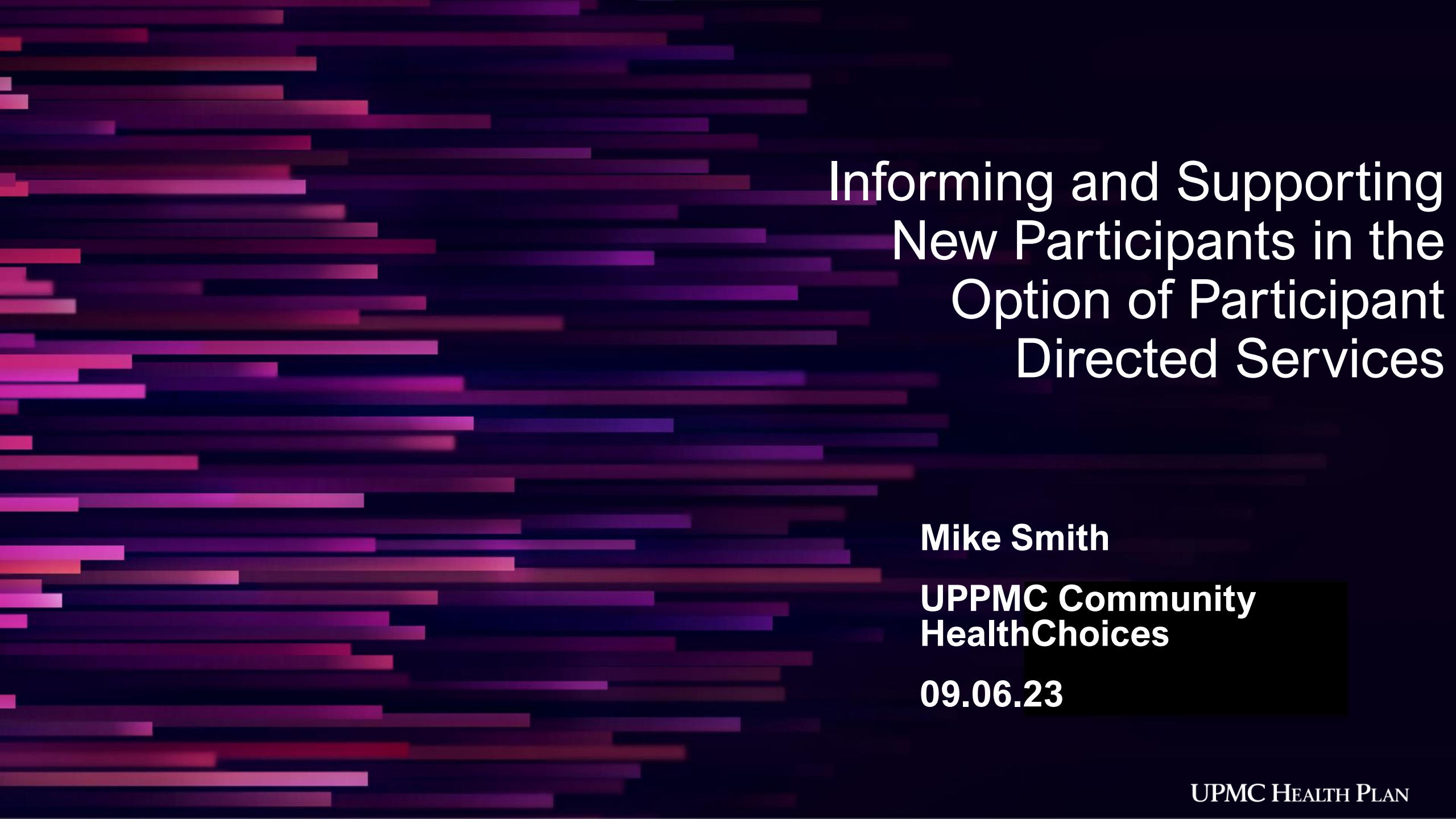
# Services My Way

Services My Way (SMW) is another option for the delivery of PAS through the management of a monthly budget.

- ✓ The SC completes an in-person visit with the participant requesting the SMW option. The SC differentiates this program from the traditional consumer directed model as this involves managing a monthly budget.
- ✓ The participant's "bank" is a monthly budget based upon the PAS hours of care that have been authorized per week.
- ✓ A monthly budget is calculated based on the weekly authorized hours and the region rate
- ✓ The monthly budgeted dollars are used for a participant's PAS needs and for goods and services
- ✓ The PHW job aid is provided to the SC and support staff to assist in the execution of the program.

**Thank you for your attention.**

**Questions?**



# Informing and Supporting New Participants in the Option of Participant Directed Services

**Mike Smith**

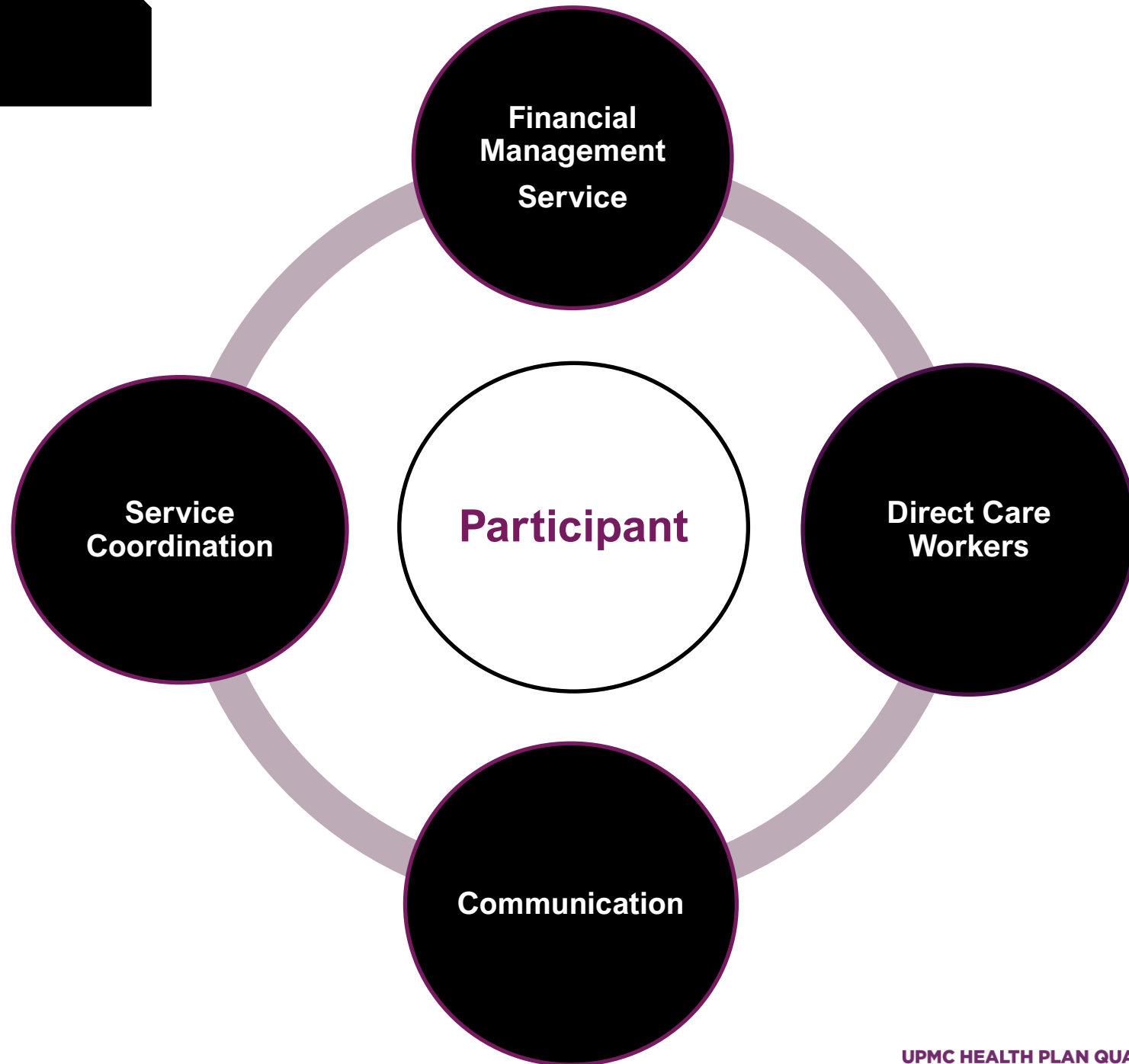
**UPPMC Community  
HealthChoices**

**09.06.23**

## UPMC CHC Approach to Participant Direction

- *Participant-Direction (PD) is a service delivery model that gives Participants choice and control over their services, so they may live as independently as possible in the community.*
- *PD is presented as the first option over the traditional agency model.*
- *Participant-Directed Personal Assistance Service (PAS) and Budget Authority (Services My Way (SMW)) must be discussed with the Participant during assessments and PCSP planning sessions.*
- *UPMC CHC Supports the Office of Long-Term Living's efforts to support and improve the use of both Employer and Budget Authority.*

**Four-  
Components  
for  
Improving  
Participant -  
Direction**



# Education for Participants – The Process

During the Assessment process SCs learn about what is important to the Participant and who is part of their circle of support.

Following the completion of the InterRAI assessment or during the functional and/or informal supports sections, the SCs may begin to discuss of the models and types of service.

SCs provide an overview of the PD model during the development of the Person-Centered Service Plan

Participant's roles and responsibility in SMW or PD-PAS is reviewed, and information shared on role of Tempus (Financial Management Services) and SC.

After the model of care is indicated, goals developed and service needs identified, the PCSP is finalized.



- ✓ *Personal Assistance Service Handout – Includes information on Participant Direction.*
- ✓ *Participant information and discussion during future interactions with Service Coordinators.*
- ✓ *Participant Handbook – Provides information on the program.*
- ✓ *Information reviewed about Tempus Unlimited, the Financial Management Services provider and their role.*



## Supporting Improvements – Current and Underway

- ✓ *Service Coordinators receive regular training on the model and the importance to Participant empowerment.*
- ✓ *Direct care worker training has been instituted. Provides payments for the completion of training models.*
- ✓ *All Managed Care Organizations Coalition Communication Workgroup is meeting with Tempus to develop additional educational materials.*
- ✓ *Participant Direction Handout – Specific leave behind is being developed for both PD-PAS and SMW.*

**Efforts to Create Growth**



Questions?

