



GILLINGS SCHOOL OF GLOBAL PUBLIC HEALTH
Health Policy and Management

Foundational Leadership in HCBS:

Building Expertise to Better Support People in their Homes and Communities

Course Syllabus 2025

Course Learning Objectives

In this course, you will learn to:

1. Explain the structure, financing, and evolution of long-term services and supports (LTSS) in the United States
2. Analyze the populations served by LTSS and HCBS.
3. Compare and evaluate the different Medicaid authorities and programs used to deliver HCBS.
4. Assess the roles and responsibilities of providers, service coordinators, and other stakeholders in the delivery and management of HCBS.
5. Evaluate systems and processes involved in eligibility, enrollment, and service planning for HCBS.
6. Apply principles independence, and participant-centered care in the planning and delivery of LTSS.

Meet the Instructors

Anne Jacobs, MHA

Anne Jacobs is a principal with Riverstone Health Advisors. For more than two decades, Anne has consulted to and advised government agencies, health plans and providers as they strive for success in government healthcare programs. She specializes in the design, implementation, ongoing operation, monitoring and assessment of Medicaid managed care programs and other government health care programs and reforms. Her recent work has focused on procurement strategies and tactics, value-based purchasing and payment, risk adjustment, technical and cost proposal negotiations, regulatory compliance, and approaches to achieve success in readiness review and ongoing program operations. Before founding Riverstone Health Advisors, Anne consulted for KPMG, Tucker Alan Inc., and Navigant Consulting. Early in her career, she served as a health policy government liaison for a national membership organization.

Erin Kent, PhD

Erin E. Kent is an Associate Professor and Associate Chair for Research in Health Policy and Management at the UNC Chapel Hill Gillings School of Global Public Health. She is a full Member of Lineberger Comprehensive Cancer Center and a Health Services Research Fellow at the Cecil G. Sheps Center, working with the Rural Health Research Program. She is a member of the North Carolina Serious Illness Coalition and Caregiving Collaborative, which both aim to elevate caregiver voices and build up state services and programs for caregivers in the state. At UNC, she runs the Caregiving Collaboratory to provide students and fellows a space for pedagogy, mentoring, and collaboration in caregiving research. With support from The Duke Endowment and the Rosalynn Carter Institute for Caregivers, Dr. Kent is currently adapting a social support intervention for caregivers of rural cancer patients to help them both recognize and build their informal support network and connect with formal support resources.

Karen Volmar, JD MPH

Karen Volmar is a Professor and Associate Chair for Academic Programs in the Department of Health Policy and Management. She began her public health career as a managed care coordinator at Fenway Community Health Center in Boston, MA. Following completion of her JD and MPH at Boston University, Ms. Volmar served as in-house counsel for Pioneer Behavioral Health and then as Employee Benefits Manager at Penn State University where she led the transition to a population health management approach to benefit programs. Ms. Volmar transitioned full time to academia in 2006 and has since served as Program Director of Master of Health Administration or public health programs at the Pennsylvania State University, Oregon State University, and the University of North Carolina, Chapel Hill. Ms. Volmar is also a Fellow of the American College of Healthcare Executives.

Course Outline

Topic	Session Learning Objectives	Learning Activities
Training Orientation	<ul style="list-style-type: none"> Identify learning and leadership development goals. Appreciate the stakeholders involved in LTSS. 	<ul style="list-style-type: none"> Read Orientation materials Get started with the HCBS Training
Module 1: LTSS Systems and Policy: Introduction to Long Term Services and Supports		
Session 1.1: Introduction to LTSS	<ol style="list-style-type: none"> 1. Explain LTSS in the US 2. Describe populations accessing LTSS 3. Describe LTSS providers and settings 4. Explain home and community-based services (HCBS) and their role in LTSS 5. Explain LTSS costs and main sources of financing. 	<ul style="list-style-type: none"> -Complete on demand module -Complete application activities (scenario responses and quiz question) -Complete course evaluation
Session 1.2: LTSS History and Structure	<ol style="list-style-type: none"> 1. Describe the significant events or forces that shaped the way the LTSS delivery system has changed over time in the U.S. 2. Identify key federal laws that helped to develop long-term services and supports 3. Describe the role of the federal government and states in administering LTSS 4. Appreciate the contribution different entities make in the payment of LTSS 5. Appreciate the complexity of the LTSS system for policymakers, administrators, and beneficiaries to navigate 	<ul style="list-style-type: none"> -Complete on demand module -Complete application activities (scenario responses and quiz question) -Complete course evaluation

Topic	Session Learning Objectives	Learning Activities
Session 1.3: The Older Americans Act	<ol style="list-style-type: none"> 1. Identify key features, terminology, and concepts underlying the Older Americans Act 2. Describe OAA services and programs 3. Recognize the administration and funding mechanisms of the OAA. 	<ul style="list-style-type: none"> -Complete on demand module -Complete application activities (scenario responses and quiz question) -Complete course evaluation
Module 2 Medicaid HCBS Programs, Provider Types, and Services		
Session 2.1: Overview of Federal Authorities for Providing State Medicaid HCBS	<ol style="list-style-type: none"> 1. Describe the differences between traditional Medicaid state plan and waiver authorities and the circumstances under which to use one versus the other 2. Describe federal authorities under which different HCBS services can be covered as well as the difference between “mandatory” Medicaid benefits and “optional” Medicaid benefits 3. Recognize traditional Medicaid state plans and Medicaid 1915(c) HCBS waiver documents 4. Identify how LTSS professionals might use these resources in carrying out their jobs 5. Begin to use their knowledge of waivers and state plans to evaluate what options might and might not be available to a prospective waiver participant or group of participants 	<ul style="list-style-type: none"> -Complete on demand module -Complete application activities (scenario responses and quiz question) -Complete course evaluation

Topic	Session Learning Objectives	Learning Activities
Session 2.2: Medicaid HCBS Services and Provider Types	<ol style="list-style-type: none"> 1. Navigate through the CMS HCBS Service Taxonomy and through existing waivers to understand HCBS services covered today 2. Understand the types of providers that render Medicaid HCBS services 3. Use CMS resources to make an initial assessment as to whether an LTSS service might be approved by CMS 4. Describe, at a high level, the vital role of the service coordinator (also called a case manager in some states) and the service plan 	<ul style="list-style-type: none"> -Complete on demand module -Complete application activities (scenario responses and quiz question) -Complete course evaluation
Module 3: Eligibility, Enrollment, and Service Planning		
Session 3.1. HCBS Program Eligibility	<ol style="list-style-type: none"> 1. Describe the process by which an individual who wants to access LTSS could "enter" the system 2. Describe what an individual might experience and what steps might occur at each step of the process 3. Describe how individuals are determined eligible for Medicaid HCBS services 4. Describe the basic duties of the service coordinator (also called a case manager in some states) 5. Describe how centralized databases can be used to streamline administrative activities and improve individuals' experiences 	<ul style="list-style-type: none"> -Complete on demand module -Complete application activities (scenario responses and quiz question) -Complete course evaluation
Session 3.2 Individual's Rights and Protections	<ol style="list-style-type: none"> 1. Understand individuals' rights and best practices in decision making (and be able to recognize when they are being used) 	<ul style="list-style-type: none"> -Complete on demand module -Complete application activities (scenario responses and quiz question)

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	<ol style="list-style-type: none"> 2. Describe how the Disability Rights Movement (which students learned about in Module 1) have shaped these rights and best practices 3. Demonstrated application of individuals' rights, best practices in decision making, and historical events when interacting with participants, colleagues and community members orally and in writing. 4. Describe what Abuse, Neglect and Exploitation are and the role of protective services in addressing them 5. Understand the role of authorized representatives and guardians in the lives of some HCBS participants, as well as the related risks and benefits 	<ul style="list-style-type: none"> -Complete course evaluation
Session 3.3: Emerging Trends and Future Directions in HCBS	<ol style="list-style-type: none"> 1. Identify factors influencing the need for LTSS 2. Identify factors influencing the supply of LTSS 3. Discuss variation in LTSS use across populations 4. Appreciate federal and state oversight of LTSS service delivery 5. Discuss federal and state approaches to address barriers to accessing LTSS 	<ul style="list-style-type: none"> -Complete on demand module -Complete application activities (scenario responses and quiz question) -Complete course evaluation
Session 3.4: Completion Activities	<ul style="list-style-type: none"> • Apply the concepts of independence and patient centered planning in LTS. 	<ul style="list-style-type: none"> - Capstone/Quiz Activity - Training Evaluation and Feedback