

**Administration on Community Living (ACL) No Wrong Door
System Person-Centered Counseling (PCC) Training Program**

Course Title: Person-Centered Access to Long-Term Services and Supports

Lesson Number & Title: 2 Considerations in Presenting and Determining Options

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Course Title: Person-Centered Access to Long-Term Services and Supports

Lesson Number & Title: 2 Considerations in Presenting and Determining Options

Page No: 1

Narration:

Welcome to the lesson on Considerations in Presenting and Determining Options. This lesson is part of the course on Person-Centered Access to Long-Term Services and Supports in the Person-Centered Counseling Training Program. Please review the information on this screen and go to the next page when you are ready.

Text:

Welcome!

Here is a description of the lesson you are starting:

Person-centered discovery helps people identify their strengths, goals, and preferences. Person-Centered Counseling professionals play an important role in facilitating the discovery process and streamlining access to resources. This lesson introduces 11 key considerations that you can use as you support people. These considerations can be used at any time in the process.

1. Start with what the person says they want
2. Responding to urgent needs
3. Identifying and sorting resources
4. Supporting access and eligibility
5. Considering timelines and limits

6. Financial implications
7. Supporting selection of providers
8. Appeals and grievances
9. Helping with the impact of unmet needs
10. Working with authorized decision-makers
11. Providing ongoing support

Learning Objective

After completing this lesson:

You will be able to use 11 key considerations when presenting options and streamlining access to person-centered support.

To view course information, including On-the-Job Training Assessments, Portfolio Assignments, and a list of Activities, click on the “Menu” tab and then click Lesson Information.

This course is one of the six foundational courses in the No Wrong Door System Person-Centered Counseling (PCC) Training Program meant to provide basic skill and knowledge related to the identified competencies for a PCC professional. Click on the box below to learn about how person-centered thinking approaches are infused throughout these courses.

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Narration:

When a person contacts the No Wrong Door system, they may have a very limited understanding of the available options or they may be very knowledgeable. Person-Centered Counseling professionals must listen closely to what the person is asking for and use discovery to ensure they understand the context of the requests. Making assumptions or jumping to conclusions may lead to a poor support. Person-centered discovery will help you uncover goals, preferences, strengths, and resources that have meaning for the person. By considering what the person says they want, you can provide the best support for the person and help them make informed decisions. Review the information on the page. When you are ready, go to the next page.

Text:

Start With What the Person Says They Want

It is important to listen to people and use person-centered discovery. Person-Centered Counseling professionals support people in identifying what is important to them and how they would like to manage what is important for them. They also support people in connecting to meaningful resources in ways that reduce confusion and burden.

Activity: What the Person Wants

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Narration:

Planning is a great thing. But many people will have urgent needs or crises. They require immediate action. For example, a person may have just lost their job, house, or primary caregiver. They may be afraid to return home due to family conflict. People in crisis may need immediate coordination of support and access to resources. Review the information on the page. When you are ready, go to the next page.

Text:

Responding To Urgent Needs

Person-Centered Counseling professionals need to be able to distinguish between long-term and immediate needs. They must be able to meet urgent needs in a person-centered way. While some crises are clear, a person's feelings of urgency are related to many things. Many professionals consider only life threatening situations as "urgent." However, for caregivers or the person managing an ongoing and challenging situation, urgency may be based on many other concerns. Good listening can help ensure these needs are met as well.

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Narration:

Person-centered support includes identifying available resources. It also includes supporting the person to sort through these various options and make their best decisions. Knowing what the person wants and how urgent their needs are is essential. Often there are many ways to approach a situation. You should try to offer information that best matches the person's goals. Review the information on the page. When you are ready, go to the next page.

Text:

Identifying and Sorting Resources

The next key consideration is identifying and helping the person sort through the available resources that can be used to meet the person's goals. There are many federal, state, and local resources to think about. People also have natural and community support options including private pay. Helping people to identify the resources that best meet their needs is an important part of your job. Using person-centered thinking (PCT) strategies in discovery can help you narrow down the options. You will share important details like eligibility requirements, timelines (how long it takes to access the resource), and ways to pay for various resources. These considerations will help people make decisions about which resources to use. Examples of public, private, and local resources will be discussed more in later lessons.

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Narration:

There are all kinds of resources that can help people. Some will be easy to access. Some will involve a lengthy application that examines many aspects of a person's financial, functional, medical, and personal information. Some will involve long waits even after approval. Being clear about these aspects of relevant programs and services can help people determine which resources best fit their needs. Review the information on the page. When you are ready, go to the next page.

Text:

Supporting Access and Eligibility

Person-Centered Counseling (PCC) professionals can support people by clearly explaining eligibility requirements and offering support through the process. For access to many federal or state programs, this may include working with the person and other professionals to ensure applications are completed correctly the first time. For other resources, it can mean helping the person get in contact with the correct person and organizing their questions. It often means following up to ensure everything is on track.

Here are some tips for supporting access and eligibility:

- Support people in understanding how each resource might help them in reaching their goals. Help them also understand the drawbacks and limits to accessing it. This includes all resources, including private pay, natural support, local, or federal programs. Help them sort with a clear understanding of the pros and cons.

<bullet> Let people know their rights in the process. They are not required to participate in any service or support they don't find helpful. If found ineligible for a program or service, they are allowed to appeal this determination.

Understand your state's Ombudsman office.

<bullet> Keep the person-centered goals in mind. They are unlikely to be met with just one resource. Consider the whole and make sure that you know about a variety of options in your area and include natural or community supports in the mix.

<bullet> Talk with other professionals and people you have supported to ensure you are knowledgeable about the actual experience of trying to access resources. Try to minimize unexpected delays. Your goal is to help arrange supports that actually will work for the person, not to get them signed up for programs.

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Narration:

As noted, each resource will have a different timeline for availability. They may also have limits on how long they can be used. People may lose access to certain resources if their circumstances change. People need to plan for timelines and limits when developing their plans. Review the information on the page. When you are ready, go to the next page.

Text:

Considering Timelines and Limits

People may want help in organizing their resources in a way that avoids gaps in support. You will want to share the following in your discussions:

- <bullet> How soon will the person know if they are eligible for a resource? How soon can they access service after that (not only literally, but also realistically)?
- <bullet> How long can a person access this resource? What changes in circumstances have to be reported? How might that impact access?

Activity: Resources and Timelines

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Narration:

People who are exploring long-term services and supports will need to know the financial implications of choices. Many public programs have limits on income and/or assets. They may have reporting requirements that involve significant detail. Benefits may be lost if circumstances change. People may want to pay privately for services but not know the going rate. They may need support for budgeting or thinking about how they can arrange their resources. This topic will be discussed further in other lessons in this course. Review the information on the page. When you are ready, go to the next page.

Text:

Financial Implications

While a Person-Centered Counseling (PCC) professional does not need access to a person's financial statements to support them, it is important to discuss the financial implications of accessing each resource. The costs and limits for programs, services, and supports can vary widely. In order to take action people often need to understand this thoroughly. For many public resources, people with incomes over the poverty level and/or with significant assets will be affected differently than people without assets and people who live at or close to the poverty line. Of course, other programs and resources (such as community and natural supports) may have a different set of criteria for access and be available to anyone.

PCC professionals can help people be knowledgeable and creative in this area. For example, you can help people understand and maximize their insurance coverage. You can connect people with no cost, low cost, or sliding fee services of all types (grants, faith-based programs, resources available to everyone, and resources based on situation/need rather than income). You can also help people avoid costly mistakes, such as seeking nursing facility care when home and community based or other services may make more sense.

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Narration:

People who are eligible for services and those who want to private pay for services have some decisions to make. Will they fully self-direct those services? Or will they use intermediaries to help with portions of them? Supporting people as they make these choices can be part of the Person-Centered Counseling professional's role. You can assist in the process by explaining the benefits and drawbacks of each choice. You can also help people locate and select providers of services. A good match between the person and hired supporters can have a very positive impact on the person's well-being and outcomes. Review the information on the page. When you are ready, go to the next page.

Text:

Supporting Selection of Providers

People with long-term services and support needs have historically had few choices regarding how services were organized and who provided them. However, there are more options that support self-direction available today than ever before. Choice is good, but it also requires knowledge. A Person-Centered Counseling (PCC) professional can help people make good choices by providing information that makes sense. You should be familiar with self-directed options for Medicaid waiver services (you can learn more in the lesson on Medicaid). People using those options can usually choose between full self-direction (being the employer of record) and working with a financial management service or support broker to help with hiring staff and managing the paperwork. Self-direction includes a flexible budget that can

be used for goods or services. It is very similar to private-pay options. Other people may choose a more “package” approach as offered by the state such as shared living options or staffing services where they have less control over specific hiring and how support is organized. You should learn about the specific options available in your state.

Regardless of how a person chooses to purchase and organize support, they will likely be interested in specific details about providers of these services. They may want to know: Who provides this service? Who is known for being reliable or meeting needs like theirs? How much does the service cost? What happens if they are unhappy with the services? What are the potential benefits and drawbacks of each provider as they relate to needs and goals? PCC professionals should have some of this information and be willing to help the person sort through these options.

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Narration:

Ideally, your screening and protocols for supporting people in applications will prevent people who are not eligible for programs from applying. However, sometimes people are denied access to a program even though it appears they should be eligible. There may also be issues with programs or providers that do not deliver services as expected. Almost all programs and services have a defined process for appealing decisions or expressing grievances. However, these processes are not always clear. Person-Centered Counseling professionals can help people navigate these situations. Review the information on the page. When you are ready, go to the next page.

Text:

Appeals and Grievances

People may not understand that they have a right to appeal or submit a formal grievance. They may need help to know about these processes or how to advocate for their rights. They may need help in filling out the necessary paperwork. One way Person-Centered Counseling (PCC) professionals can assist people is by explaining the process for submitting an appeal or grievance. Another is to help the person organize the necessary documents for an appeal or help them communicate well (support for writing letters, filling out forms, or making phone calls). You may also assist in making necessary contacts to clarify and go through the process. Lastly, as a PCC professional, you may let people know about legal aid and

advocacy options.

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Narration:

Sometimes people will have needs, but adequate support will not be available for them. This is considered an unmet need or a gap in support. Person-Centered Counseling professionals play an important role in assisting people with unmet needs. They can help people find creative ways to fill these gaps. Review the information on the page. When you are ready, go to the next page.

Text:

Helping With the Impact of Unmet Needs

You may encounter a situation where a person has a need, but there are no clear resources available to meet that need. This may happen for a variety of reasons such as:

- <bullet> A person wants a particular service but they don't meet eligibility criteria and they don't feel they can afford to pay for it.
- <bullet> A person wants service and supports organized in ways that do not currently exist and does not want to use the options that are available.
- <bullet> A person is eligible or can pay but lives in a location where the service or support is not available.
- <bullet> The person has few personal social or financial resources to draw from.
- <bullet> There are long wait lists for services and the person needs support now.

When seeking to fill gaps, the three promises of person-centered thinking (PCT) are needed. You will not ignore something a person feels is important, just because you don't know how to help them with it yet. Not every problem can be solved overnight but commitment is critical. Networking will be a great help. Ongoing follow-up is essential. It's also important to document unmet needs both in your own records and more systematically in your region and state. This information helps you stay on track and provides information for future community development. Working/not working, learning log, and 4+1 questions are PCT strategies that will be helpful in this process.

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Narration:

Authorized decision-makers play an important role in supporting people. You should be aware of the people in each person's network who have rights and obligations to support people with their decisions or make decisions for them. These situations can be highly restrictive and, at times, involuntary situations. Some examples include when a person has a guardian, a parole officer, or is under a civil commitment. They can also be voluntary such as when a person has signed a power of attorney or advanced directive. They can even be completely informal, like when a person allows a family or other unpaid caregiver to make decisions on their behalf. Review the information on the page. When you are ready, go to the next page.

Text:

Working with Authorized Decision-Makers

People will come with a variety of situations, backgrounds, and needs. Sometimes they will have formal or informal authorized decision-makers involved. The following are tips for working with authorized decision-makers:

- <bullet> Take time to find out what relationships exist and the roles and boundaries of each relationship. Check in on any discrepancies between the person and the decision-maker. Clear these up early and make sure everyone is in agreement and comfortable with the decisions. Make sure you are also following any applicable laws. Laws vary from state to state.
- <bullet> Share information with decision-makers only as directed by the person or required by law. Few decision-makers (even guardians and

courts) have a right to know everything about the person without their permission.

- <bullet> Find out if the person has designated someone to make healthcare, financial, or other decisions if they are incapacitated.

- <bullet> Follow your agency's policies for required documentation regarding legal decision-makers.

- <bullet> Learn some of the legal terms that you may encounter, such as consent, power of attorney, payee, conservator, guardian, competent, incapacitated. Definitions vary by state.

- <bullet> Pay attention to decision-makers. Listen to what they have to share. Know their concerns. However, you must still work in a person-centered way that allows for maximum self-direction as allowed and desired by the person.

- <bullet> Help the person connect to mediation or advocacy services if there is a conflict with the decision-maker that cannot be resolved through person-centered counseling.

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Narration:

The process for identifying and obtaining resources for long-term services and supports in an era of increased choices is more fluid. People change over time and so do their needs, wants, and desires. Programs and services also change as new laws and policies are passed. Follow-up and being accessible in an ongoing way is part of the role of a Person-Centered Counseling professional. Review the information on the page. When you are ready, go to the next page.

Text:

Providing Ongoing Support

Follow-up and ongoing support are key aspects of person-centered counseling. Providing an anchor resource for people as they move through the system can help it seem more friendly and useful. It reduces the sense of fragmentation. A consistent person-centered approach encourages people to think flexibly and speak up for what they want. It also encourages them to draw from the many resources they have in their personal network to meet their goals.

There are many possible ways to accomplish a goal and accommodate preferences. If people are seeking help for the first time, they do not have much experience to draw from and may need to try a few things first. Sometimes the right choice is unclear. A person can be encouraged to try something and see how it works for a period of time. Let them know that their decision is not final and can be adjusted. You may let them know that

not deciding at that moment is fine too. However, ask them if they would be willing to have you reach out in a reasonable period of time to see how things are going. Encourage people to contact you sooner if they want more information or want to revisit their plan.

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Narration:

Congratulations! You have now finished the lesson. Let's take a few moments to review the key ideas and learning objectives.

This lesson reviewed eleven key considerations that will help you when supporting people to understand, select, and organize long-term services and support options. Putting these considerations into practice will help you to support people in making progress toward their person-centered goals through the best use of resources.

Please review the information on this page. You can also review the content as needed by using the "Left Arrow" icon at the bottom of the screen. This will take you back through the lesson. You may take the test now, later, or as requested by your employer. Good luck and thanks for completing the lesson!

Text:

Conclusion and Lesson Review

- <bullet> Key considerations for supporting streamlined access to LTSS options always start with what the person says they want and use discovery to gain context.
- <bullet> Assessing urgency of needs is part of this process. However,

professional assessments of urgency and the assessments of the people seeking help are different. Pay attention to both.

- <bullet> The process for supporting people is not linear, people and resources can change over time. You must be ready to support people wherever they're at. Follow-up and ongoing support may be needed.

- <bullet> Know the boundaries and expectations of authorized decision-makers in a person's network. However, people still direct each aspect of their lives to the greatest extent possible.

- <bullet> Being familiar with a wide variety of resources and help people understand them.

- <bullet> Keeping good records and doing follow-up will help you provide reliable support for people.

Reflection on Learning Objectives

Directions: Review the objective(s) on this page. When you are done click on the "My Notes" icon at the top of the screen to use the electronic journal or use your own notebook. Write down your answers to the following questions.

1. What did you learn in this lesson that you felt was important?
2. What will you do differently because of the content in this lesson?

Learning Objectives

After completing this lesson, you will be able to use 11 key considerations when presenting options and streamlining access to person-centered support.

If you are ready to take the test, click on the "Take Test" tab. You can also take the test later: It will be available from your "Personal Page." To access it, click on the "My eLearning Lessons View" button. Choose the lesson title from the list of assignments, and then click on the "Start the Lesson" button at the bottom of the screen. Click the "Take Test" tab to start the test.

We recommend that you complete the On-the-Job Training Assessments and Portfolio Assignments for this lesson. They will help you demonstrate

competencies for the ideas presented. To view On-the-Job Training Assessments, Portfolio Assignments, and a list of Activities, click on the “Menu” tab and then click “Lesson Information.”

Again, congratulations and good luck!

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