

**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: 5 Medicaid and Long-term Services and Supports**

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Narration:

Welcome to the lesson on Medicaid and Long-term Services and Supports. 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:

This lesson will give the learner a basic overview of Medicaid as a funder of long-term services and supports (LTSS). It will describe recent changes in the expectations and funding of Medicaid LTSS options. It will provide a basic understanding of eligibility. This lesson is only a starting point for understanding Medicaid and is not comprehensive. Person-Centered Counseling (PCC) professionals need to understand their state's Medicaid waiver programs and other long-term care programs. They need to know how Medicaid intersects with other programs, eligibility requirements, and the implications for people who are seeking these services or who may be eligible for services.

Learning Objective

After completing this lesson:

You will be able to determine who might be eligible for Medicaid LTSS programs based on the requirements and availability of services in your state and region.

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:

Medicaid is a federal program. It combines both federal and state dollars to help states pay for services and monitor service providers. There are some Medicaid programs that states must offer to people. Other programs are optional. It is important for person-centered counseling professionals to understand which programs are offered, who might be eligible, and how each program helps to fund long-term services and support options. Review the information on the page. When you are ready, go to the next page.

Text:

How is Medicaid Connected to Publicly Funded Long-Term Services and Supports?

Medicaid is a federally sponsored cost-share program with states and is the primary resource for publicly funded long term supports and services (LTSS). It is also a funding stream the states use to cover health care for certain populations (which is covered in the lesson on insurance). Each state can decide to what degree they will participate in Medicaid. They describe this in what is called their State Plan for Medicaid. Under Medicaid, certain options are required in a state plan and basic eligibility for many of those programs is defined by the federal requirements. Other options can be selected and used more flexibly by the state or not used at all. The states also have more flexibility in defining eligibility requirements for these local programs. As a result, how Medicaid is used in states for LTSS specifically is not consistent. Medicaid is complicated. Take this short quiz and see how

well you know this program.

Activity: Medicaid Quiz

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Narration:

Person-centered counseling professionals play an important role in helping people access long-term services and supports through Medicaid. In order to do this, they need to have a general understanding of the available options as well as the eligibility criteria. They also need to know about the person's preferences and goals. If someone is interested in gaining access to supports through Medicaid, person-centered counseling professionals should be able to explain how Medicaid can help them reach their goals. They should also be able to support them through the process if requested. Review the information on the page. When you are ready, go to the next page.

Text:

Your Role in Medicaid Long-Term Services and Supports (LTSS)

Medicaid LTSS options are very complicated and constantly changing. Person-Centered Counseling (PCC) professionals do not need to know these options in great detail, but they should have a basic understanding. PCC professionals should consider Medicaid in the context of person-centered discovery and person-centered plans. You should also be familiar with general eligibility criteria. It helps to understand the Medicaid LTSS benefits and options in your local area, including:

<bullet> What programs, services, and providers are available – what does

the local version look like?

- <bullet> Who to contact for more information on eligibility criteria and the application process (most states will have Medicaid specialists who can help)
- <bullet> Whether or not there are waiting lists or limited openings for these programs – if the person is eligible, are these services likely to be available and in what timeframe?
- <bullet> How Medicaid LTSS programs intersect with other public programs, such as Supplemental Security and Medicare/Medicaid insurance programs, and how to streamline the processes between them

The PCC professional will help people in organizing paperwork and preparing for eligibility assessments. They may also have a role in supporting appeals to denial of services. Click on the link below to read more about the implementation of person-centered planning and self-direction. <http://www.acl.gov/Programs/CDAP/OIP/docs/2402-a-Guidance.pdf>

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Narration:

Medicaid fits into a broad scope of social and healthcare programs supported by the federal government. Current trends in service development are to support communities to develop programs that are less expensive and more person-centered through the use of more flexible options. People can choose just what they need and not be overserved. They can stay in their own homes and communities if they want to. The idea is to provide just the right amount of service in just the right way that works for both communities and individuals. Review the information on the page. When you are ready, go to the next page.

Text:

Trends in the Use of Medicaid Funded Long-Term Services and Supports (LTSS)

Just like other services and supports, Medicaid is changing. This change means becoming more inclusive, person-centered, and coordinated. The No Wrong Door system is a response to this changing approach. It's not expected that one size fits all.

With a person-centered focus, LTSS can be more effective and sustainable. Many Medicaid programs have expanded self-directed options and now have person-centered planning requirements. These programs aim to give people choice, direction, and control in their lives. They also try to offer

more culturally sensitive options.

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Narration:

Despite a strong movement toward paying for support in community, institutional care still exists. It is still paid for with Medicaid dollars. Some people may need or want access to these options. Sometimes institutional care is the only option that exists or is available. A Person-Centered Counseling professional should be aware of these options for people. Review the information on this page. When you are ready, go to the next page.

Text:

Service Types and Coverage: Institutional

Medicaid funds a variety of things. Institutional based care, such as nursing facilities, is one of them. The tabs below provide a brief description of the two most common types of Medicaid-funded institutions, nursing facilities and intermediate care facilities. They also provide some information about admission screenings and collecting data about preferences for living setting.

Person-Centered Counseling (PCC) professionals should be aware of the process for transitioning into and out of these places. They can support people as they transition. Even when it is someone else's job, the PCC professional can ensure the person's rights are being respected and that they are aware of the choices they can make and the resources available to support them. PCC professionals can help sort the person's preferences into a person-centered plan. They can also support other professionals in

coordinating these transitions, offering possible community resources and funding options.

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Narration:

States are able to apply for Medicaid waivers. These waivers help states support community-based services and supports for people, as opposed to funding institutional based services. There are multiple types of waivers that allow states to offer more flexible services to people or to use innovative approaches in supports. These waived programs often expand the types of long-term services available. However, they are used uniquely by each state so options vary locally. Review the information on the page. When you are ready, go to the next page.

Text:

Waiver Funding of Long-Term Services and Supports (LTSS)

Waivers help states promote community living for Medicaid beneficiaries and thereby help them avoid institutionalization.

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Narration:

Waivers are a way to pay for services. People must be approved for a waiver to get access. The type of waiver will often define which services are available including the scope, duration, and amount of each service that people will be able to access. However, a person will often have choices regarding where and from whom they receive services. There are several different types of Medicaid Home and Community-Based Long-Term Services and Support programs. Some provide 24-hour supports. Unlike institutional care, room and board must be arranged and paid for separately in home and community-based models. Review the information on the page. When you are ready, go to the next page.

Text:

Service Types and Coverage: Home and Community-Based Services (HCBS)

Under Medicaid, states can offer an array of services through a Home and Community Based Services (HCBS) state plan. States can set eligibility standards for participation in these benefits, which includes needs-based criteria. Services provided under HCBS can vary significantly across states. It is important to know what is available in your state.

HCBS allows Medicaid funding to be used for a variety of long-term services and supports including:

- <bullet> Employment services
- <bullet> Behavioral health

- <bullet> Residential or assisted living services
- <bullet> Home care
- <bullet> Rehabilitation services
- <bullet> Case management and/or care management
- <bullet> Respite care
- <bullet> Environmental or home modifications
- <bullet> Transportation

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Narration:

Services accessed through Home and Community-Based Service programs must now be part of a person-centered plan. This requirement is meant to ensure that what is important to the person is reflected in the supports they receive. It is meant to support choice, direction, and control over any service rather than giving people a large package of services that may not be needed or desired. Review the information on this page. When you are ready, go to the next page.

Text:

Supporting Choice in Selecting Services

Reflection Activity: Selecting Services

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Narration:

Changes in programs and funding for Medicaid services show the commitment to support individuals in living self-directed lives in the communities of their choice. Review the information on the page. When you are ready, go to the next page.

Text:

Services Types and Coverage: Home and Community-Based Services (HCBS)

Medicaid long-term services and support options will vary from state to state. The new HCBS rule helps states to better understand what self-direction means and defines which settings meet the HCBS criteria for community living. Below are two options that might be available in your state. It is important for you to learn about which options are available in your state and how they can help people in reaching their goals.

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Narration:

It's important to know that there are income requirements to be eligible for Medicaid. Medicaid eligibility is based on financial need. It is based on the federal poverty level. As poverty levels adjust yearly, the Medicaid requirements adjust. Some people will be interested in learning about how Medicaid can help cover costs related to long-term services and supports. Person-Centered Counseling professionals play an important role in helping people understand the eligibility requirements and connecting them to the appropriate Medicaid specialists. Review the information on this page. When you are ready, go to the next page.

Text:

Medicaid Eligibility for Coverage

Some things to know about Medicaid eligibility:

- <bullet> If a person's financial assets (not including a primary home, primary vehicle, or some other protected assets) exceed Medicaid limits (based on Medicaid's asset test) their assets must be spent down to become eligible for nursing homes or state option Home and Community-Based Services (HCBS) waived services.
- <bullet> People with assets or other resources (not including protected assets) must use them before becoming eligible.
- <bullet> People do not always have to spend down their financial resources to become eligible. There are some options, such as a Special Needs Trust, that people may be able to access via a lawyer to avoid using up their

assets.

- <bullet> People generally cannot give away assets to family or others to receive Medicaid benefits.

- <bullet> There are some minimal safeguards for income and assets for spouses (e.g. spousal impoverishment protections) but, in general, a significant proportion of income and assets must go to pay for the person's care in order for a person to be eligible for Medicaid payments.

- <bullet> Although most Medicaid programs will not allow funding for room and board, some institution providers receive payment for room and board if the person's income cannot cover the costs. Beneficiaries generally cover their own food and shelter costs when they receive long-term services and supports in their homes and communities.

Some Person-Centered Counseling professionals or their organizations may become certified through the Center for Medicaid Services' Provider enrollment, chain, and ownership system (PECOS). PECOS is an electronic management system that lets users apply for Medicaid, track enrollment, and add or change an assignment of benefits.

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Narration:

Community-based Medicaid options include a commitment to self-directed services. The Centers for Medicare and Medicaid Services have also provided guidance on what settings meet the Home and Community-Based Services requirements. They have defined what settings are not home and community-based and what settings are presumed to have the qualities of an institution. You can read more about these standards below. Review the information on the page. When you are ready, go to the next page.

Text:

Community-Based Medicaid Options

Self-directed options provide more choice, direction, and control. As a Person-Centered Counseling professional you should be aware of these options in your state and/or county and help present them to people who may be interested and eligible. Try to build relationships with your local financial management services (FMS) and/or support brokers. These professionals can help the person find the best way to organize self-directed services.

The Home and Community-Based Services (HCBS) requirements establish definitions of HCBS settings based on individual experience and outcomes. The purpose of this regulation is to maximize the opportunity for people to receive services in integrated settings, realize the benefit of community living, and have access to the greater community, including opportunities to seek employment in competitive integrated settings. It also ensures an

individual's right to privacy, dignity, and respect, and promotes choice in selecting services and supports.

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Narration:

Now you know that eligibility for many Medicaid long-term services and supports can be based on a person's age and financial, functional, and medical needs. Each state is different from the next. It is important for you to understand which options are available in your state and how they can help people reach their goals. This page will provide a set of questions and some great websites for you to begin researching and organizing your knowledge around Medicaid long-term services and supports in your state. Review the information on the page. When you are ready, go to the next page.

Text:

Researching Availability of Services in Your Local Area

Reflection Activity: Local Services

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Narration:

Now let's look at eligibility requirements. Review the information on the page. When you are ready, go to the next page.

Text:

Researching Eligibility in Your Local Area

Reflection Activity: Local Medicaid Eligibility

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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.

In this lesson, you learned about the role that Medicaid plays in providing health and long-term care options to a variety of different populations. Although Medicaid is a federal program, each state varies in how services are offered. Person-Centered Counseling professionals play an important role in assisting people who may use Medicaid services for support.

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> Person-Centered Counseling (PCC) professionals do not need to know everything about Medicaid long-term services and supports (LTSS), but they should have a basic understanding of the options available and how

they can help people.

- <bullet> Medicaid provides a broad range of services related to healthcare, institutional care, and Home and Community-Based Services (HCBS).

- <bullet> Medicaid is a federal program, but there can be variation across states in the availability of services and supports as each state has an individual Medicaid State Plan.

- <bullet> Medicaid LTSS can provide access to HCBS that focus on self-direction and community access.

- <bullet> There are a variety of Medicaid LTSS and waiver programs. It is important to understand what is available in your area.

- <bullet> Medicaid services and supports can be combined with other programs and services to support individuals in creating self-directed lives in the communities of their choice.

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 determine who might be eligible for Medicaid LTSS programs based on the requirements and availability of services in your state and region.

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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