

June Veteran Directed Care Quarterly Educational Webinar

June 2, 2021

Announcements from ACL



**Caroline Ryan, Manager of VA
and CMS Partnerships and
Innovation**
Office of Interagency Innovation

Agenda

- ❑ Welcome and Announcements from the Administration for Community Living (ACL)
- ❑ Veterans Health Administration (VHA) Announcements
- ❑ Overview of the:
 - ❑ VDC Billing and Invoicing Guide
 - ❑ Monthly Spending Plan Template
 - ❑ Monthly Service Report Template
- ❑ Closing

Announcements from VHA Regarding VDC



Daniel Schoeps,
Director, VA Purchased
Long-Term Services and
Supports

Menti Poll

- Go to www.menti.com and enter code **7222 6305**

If you are a VDC provider, do you submit electronic claims or paper claims using the UB-04?



Please enter the code

Submit

Billing and Invoicing Guide

Highlights: Call-out Boxes

Call-out boxes incorporated throughout the guide to highlight best practices and tips to align with billing and invoice guidance

- **Call-out box example one:** VAMC Authorizations – sharing information on Veterans

Many VAMCs are using VA [REFDOC](#), an information technology (IT) solution, which sends the Veteran’s electronic medical record and other information in PDF format to the VDC provider. If you are a VDC provider not using VA REFDOC, you can discuss with your VAMC if VA REFDOC is available for your VDC program.

- **Call-out box example two:** Calculating Daily Rate – examples of direct care

Examples of **direct care** provided in the Veteran’s home include assistance with bathing, dressing, eating (to include food-prep), lawn/yard care (mowing, shoveling), and transportation to and from the Veteran’s home to attend health care visits or social activities.

Examples of **care that would not count toward direct care** include home-delivered meals, the purchase of goods (such as delivery and installation of an A/C unit), home technology purchases, and other purchases where a personal care worker is not required to visit a Veteran’s home.

Billing and Invoicing Guide Highlights: “How this works!”

How This Works!

After completion of the Purchased HCBS Case-Mix and Budget Tool, a Veteran living in Seattle, Washington, is assigned to case-mix “E”

A Veteran living in King County in Seattle, WA for case-mix “E” has a case-mix rate of \$3,555.

\$2,846 is the Veteran’s average monthly spending plan to purchase goods and services but may be higher and lower depending on the month (further described in Section IV).

\$709 covers the VDC provider’s administrative fees to include the person-centered counselor, VDC provider administration and overhead, and the FMS fee.

- “How this works!” provides examples using sample Veteran scenarios. Topics include:
 - Case-mix rate components;
 - Authorized budget and average monthly case-mix rate calculation;
 - Calculating daily rate from days of direct care; and
 - Invoicing for actual spending and tracking total spending.

Billing and Invoice Guide Highlights: Appendices

The guide features appendices for additional, in-depth guidance on topics including:

- A. Switching from Paper to Electronic Invoices
- B. Common Billing Issues and Recommendations for Reaching a Resolution
- C. VDC Case Mix Rate Calculator
- D. Veterans Health Administration Office of Community Care Provider Claim Resubmission Guide
- E. A Step-by-Step Guide for Completing Paper Invoices Using the UB-04 Claim Form
- F. Sample UB-04 Claim Form and Accompanying Monthly Services Report Documentation
- G. VDC Billing and Invoicing Guide Glossary of Terms

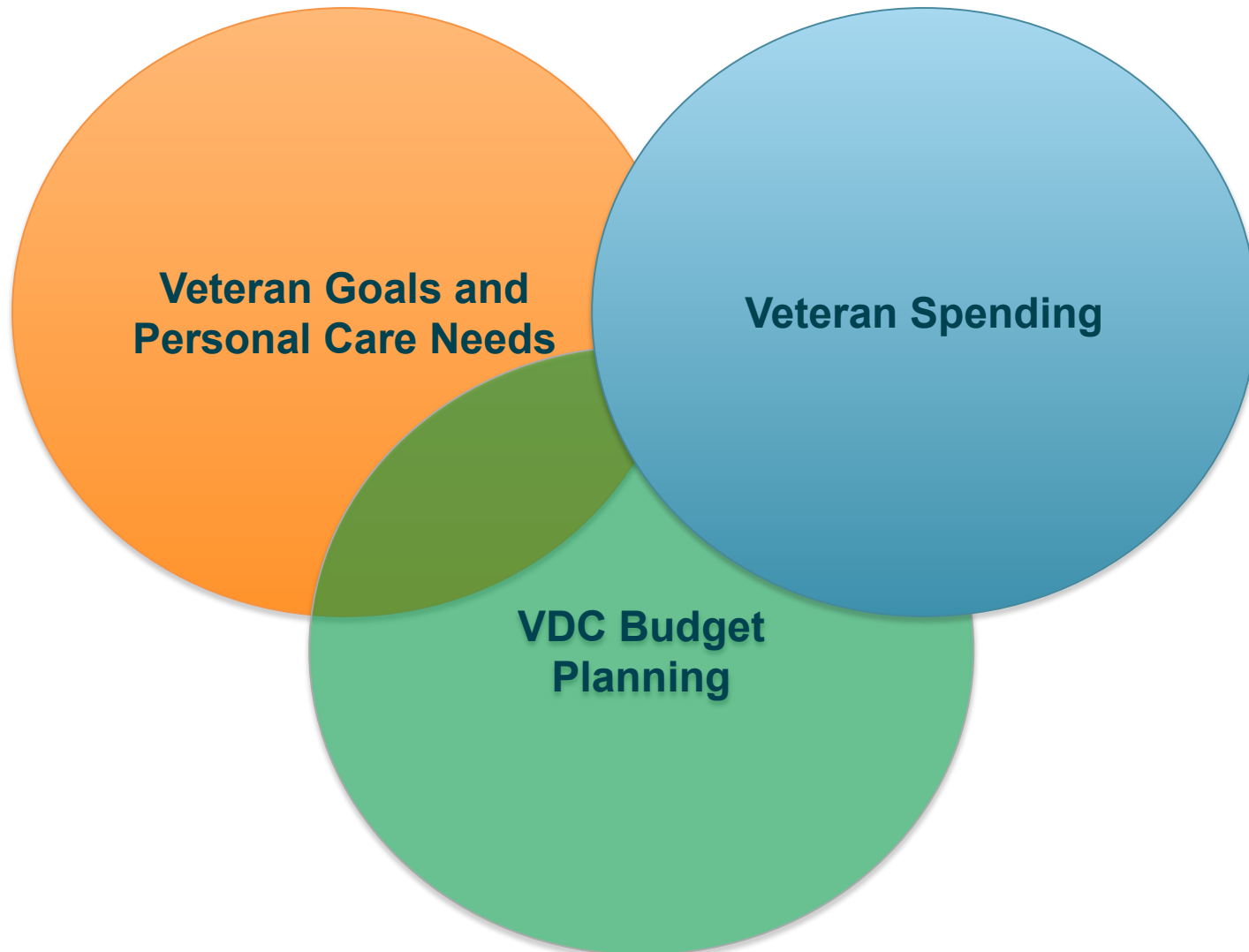
Understanding the Importance of VDC Authorized Budgets

- VAMCs issue authorizations to include the amount of the **full and partial assessment fees**, the **time period when the Veteran is authorized to receive care**, the **Veteran’s authorized budget for the authorization period**, and the **average monthly budget**.
- Veteran spending in a given month may exceed the average monthly case-mix rate.
 - ▶ This is permissible as long as all spending is documented in the approved spending plan and does not exceed the Veteran’s total authorized budget. **This guidance eliminates the need to account for “planned savings” that was previously used in VDC.**

Incorporating VDC authorized budgets into the VDC Monthly Service Report and Spending Plan

- It is the responsibility of the Veteran, with support of the VDC provider, to develop a **VDC spending plan** that maximizes their VDC budget, is below the authorized amount, track and monitor VDC spending, and make any necessary changes to the VDC spending plan to ensure spending does not exceed the authorized budget.
- Tracking total spending during the authorization is crucial for monitoring spending and ensuring that total spending does not exceed the total authorized budget.
- **Monthly Service Reports** are crucial for monitoring Veteran spending against their authorized budget and approved spending plan.

VDC Spending Plan



Overview of the VDC Spending Plan Template

- The VDC Spending Plan helps map how Veterans intend to use their VDC budget and estimate spending during their authorization period.
- The following information is required to fill-out the spending plan:
 - ▶ Information about the employees the Veteran hired, how much the worker(s) will be paid, and an estimate of the number of hours worked per month;
 - ▶ An estimate of other personal care services and/or goods that the Veteran will purchase monthly;
 - ▶ Information about back-up or emergency workers, in the case that a primary worker or caregiver is unable to provide care;
 - ▶ An estimate of any one-time goods or services by dollar amount and estimated date of purchase;
 - ▶ Estimated average monthly spending by individual worker, good, and service;
 - ▶ Estimated average monthly invoice; and
 - ▶ Estimated total Veteran spending during the period of the authorization, including all Veteran spending including one-time goods or services, and monthly administrative fees.

VDC Spending Plan Template Components

- Veteran Summary
 - ▶ Includes information specific to the Veteran including their goals, strengths, Veteran employee profile, authorized representative profile, and emergency back-up care
- Veteran Spending Plan
 - ▶ Includes information on the Veteran's one-time and monthly expenses, direct care services, routine planned goods and services, one-time goods and services purchases, and emergency back-up care
- Employee Benefits
 - ▶ Includes State and County requirements for employee benefits, if applicable

VDC Spending Plan Guidance

- VDC providers are required to submit VDC Spending Plans to VAMCs for review and approval.
- The VDC spending plan helps the VAMC understand how the Veteran intends to use their VDC budget to meet their individualized goals.

Menti Poll

- Go to www.menti.com and enter code **7222 6305**

What questions do you have about completing, submitting, and amending VDC spending plans?



Please enter the code

Submit

Overview of the VDC Monthly Service Report Components

The VDC Monthly Service Report template is used to track Veteran VDC spending by documenting actual spending. The Monthly Service Report includes:

- ▶ The Veteran's monthly case-mix rate;
- ▶ The monthly administrative rate;
- ▶ A breakout of goods and services purchased in the month by employee, good, and service;
- ▶ The total Veteran spending during the authorization period (not including the monthly administrative fee); and
- ▶ The total amount of invoices (which includes Veteran spending as well as the monthly administrative fee).

VDC Monthly Service Report Template Components

The template includes an Invoice Tracker, for a high-level view of the Veteran's actual spending for each month and a space for VDC programs to track reimbursement and payment by the VA for services rendered each month.

Veteran Name:

Date Veteran Initially Assessed:		Total Invoiced to VA to Date:	
Case-Mix Level or Score:		Total VDC Budget Spent to Date:	
Admin Fee:		Annual VDC Budget Allocation:	
Date Veteran Initiates Services:		Annual VDC Budget Remaining:	

VDC Payment Tracking						
Month	Date Invoiced	Invoice Amount	Date Reimbursed by VA	Payment Amount	Difference in Payment	Length of Time for Payment (Days)
Admin Fee		\$0.00			\$0.00	0
Month 1		\$1,061.00			-\$1,061.00	0
Month 2		\$1,019.00			-\$1,019.00	0
Month 3		\$916.00			-\$916.00	0
Month 4		\$1,085.00			-\$1,085.00	0
Month 5		\$986.00			-\$986.00	0
Month 6		\$727.00			-\$727.00	0
Month 7		\$1,260.00			-\$1,260.00	0
Month 8		\$1,164.00			-\$1,164.00	0
Month 9		\$1,177.00			-\$1,177.00	0
Month 10		\$1,040.00			-\$1,040.00	0
Month 11		\$937.00			-\$937.00	0
Month 12		\$1,007.00			-\$1,007.00	0
Month 13 (if applicable)		\$1,298.00			-\$1,298.00	0

VDC Monthly Service Report Components (Continued)

In each monthly tab, there is space for the VDC provider to input the:

- Veteran's identifying information;

Monthly Veteran Spending Report: (January 2021)

Veteran Name	John Doe	Aging/Disability Services Contact	Tina Turner
Veteran SSN	123-45-6789	Referring VAMC	District of Columbia
Authorization Period (Start and End Date)	January 2021-February 2022	Case-Mix Level	D

- The average monthly Veteran budget and monthly admin fee; and

Average Monthly Veteran Budget	\$3,000.00	Total Veteran Budget (Includes Monthly)	\$42,000.00
Monthly Admin Fee	\$500.00		

- The services and/or goods the Veteran purchases on a monthly basis, including information on emergency back-up care and planned purchases.

Personal Care/Day Care/Respite Service	Employee	Rate to Employee (Per Hour or Day)	Employer Taxes and Workers' Comp	Total Units (Hours or Days)	Day(s) of Service	Total
Personal Care	Sandy Sue	\$20.00	\$6.00	16	15,16,17,18,19,20,21,22,23,24,25,26,27,28,29,3	\$416.00
Total Employee Services						\$416.00

Purchased Non-Employee Good/Service	Vendor	Unit Cost	Units	Total
Lawn Care	Lawn Care, Inc.	\$40.00	2	\$80.00
				\$0.00
				\$0.00
				\$0.00
Total Non-Employee Goods/Services				\$80.00

Emergency Back-Up Care	Vendor	Unit Cost	Units	Total
Meals	Convenient Meals, LLC	\$15.00	1	\$15.00
				\$0.00
				\$0.00
Total Emergency Back-Up Care				\$15.00

Planned Purchases	Vendor	Unit Cost	Units	Total
Medication	Pharmacy, LLC	\$25.00	2	\$50.00
				\$0.00
				\$0.00
				\$0.00
Total Planned Purchases				\$50.00

VDC Monthly Service Report Guidance

- Monthly Service Reports are submitted to the referring VAMC for two purposes:
 - 1) VAMCs are required to verify all spending incurred by the Veteran is included in the approved spending plan - VAMCs will not reimburse for any services not included in the spending plan; and
 - 2) VAMCs are required to verify that reimbursement to a VDC provider for a Veteran does not exceed the Veteran's authorized budget. Tracking total spending during the authorization ensures total spending does not exceed the total authorized budget.
- VDC providers should discuss with their VAMC the preferred method for sending this information. Several options include uploading Monthly Service Reports to HSRM, sending via secure email, fax, or secure mail.

Menti Poll

- Go to www.menti.com and enter code **7222 6305**

What questions do you have for development, review, and approval of Monthly Service Reports?



Please enter the code

Submit

Making Changes to Your VDC Processes to Align with the Guide

- ✓ Review the VDC Billing and Invoicing Guide and identify practices that are aligned vs. not aligned
- ✓ Communicate potential areas of change with partnering VAMC
- ✓ Discuss billing and invoicing process changes to ensure alignment with local VAMC procedures
- ✓ Determine appropriate course of action and key staff to be notified

Menti Poll

- Go to www.menti.com and enter code **7222 6305**

What is one action that your VDC program would like to take to ensure billing and invoicing procedures align with the VDC Billing and Invoicing Guide?



Please enter the code

Submit

Billing and Invoicing Office Hours Series

- Three sessions focused on an interactive, in depth discussion of billing and invoicing policies and procedures

Event	Topic
Billing and Invoicing Office Hour One: VAMC Referrals, VDC Authorizations, and Veteran Spending Plans	<ul style="list-style-type: none"> • VAMC authorizations, Case-Mix and Budget Tool, HSRM • Veteran Spending Plan development
Billing and Invoicing Office Hour Two: VDC Monthly Service Reports	<ul style="list-style-type: none"> • Authorized budgets, planned purchases, and emergency back-up care • Monthly documentation of spending • Developing and sharing Monthly Service Reports
Billing and Invoicing Office Hour Three: VDC Invoices and Monitoring of VDC Accounts Receivable Monthly Services Reports	<ul style="list-style-type: none"> • Developing and submitting VDC invoices – Step-by-Step Guide • Monitoring accounts receivables • Timeliness of submitting VDC invoices and receiving reimbursement

- The series will leverage a new collaboration tool for VDC providers, the VDC Community (a part of the ACL TA Community on Forumbee)

Closing

- **VDC Monthly Reporting Tool Data Entry:**
<https://app.smartsheet.com/b/form/9bff196f995e4ddd82aa0fd246ae0501>
- **VDC Provider Suggestion Box:**
<https://app.smartsheet.com/sheets/jxPv6q8cMH5H5GcFMXMrFM7X4jrWxFhFXCV6cfm1?view=grid>
- **Forumbee:** Look out for an email to register for an account on Forumbee to become a part of the VDC community
- Please email the VDC Technical Assistance Team with any questions: veterandirected@acl.hhs.gov