

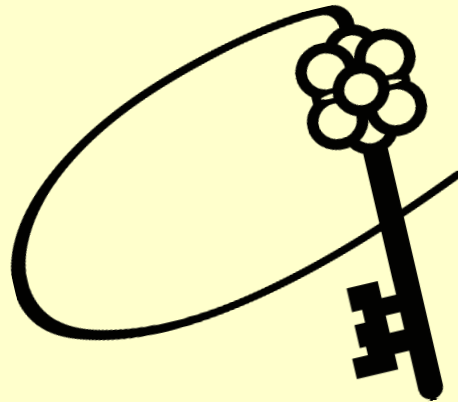


# Opening Remarks Introductions

# Agenda

- Introductions
- Overview of No Wrong Door Grant
- Scope of Workgroup
- Access to LTSS Vision
- Current Status of Options Counseling in North Carolina
- Next Steps/Timeline

# Overview of No Wrong Door (NWD)

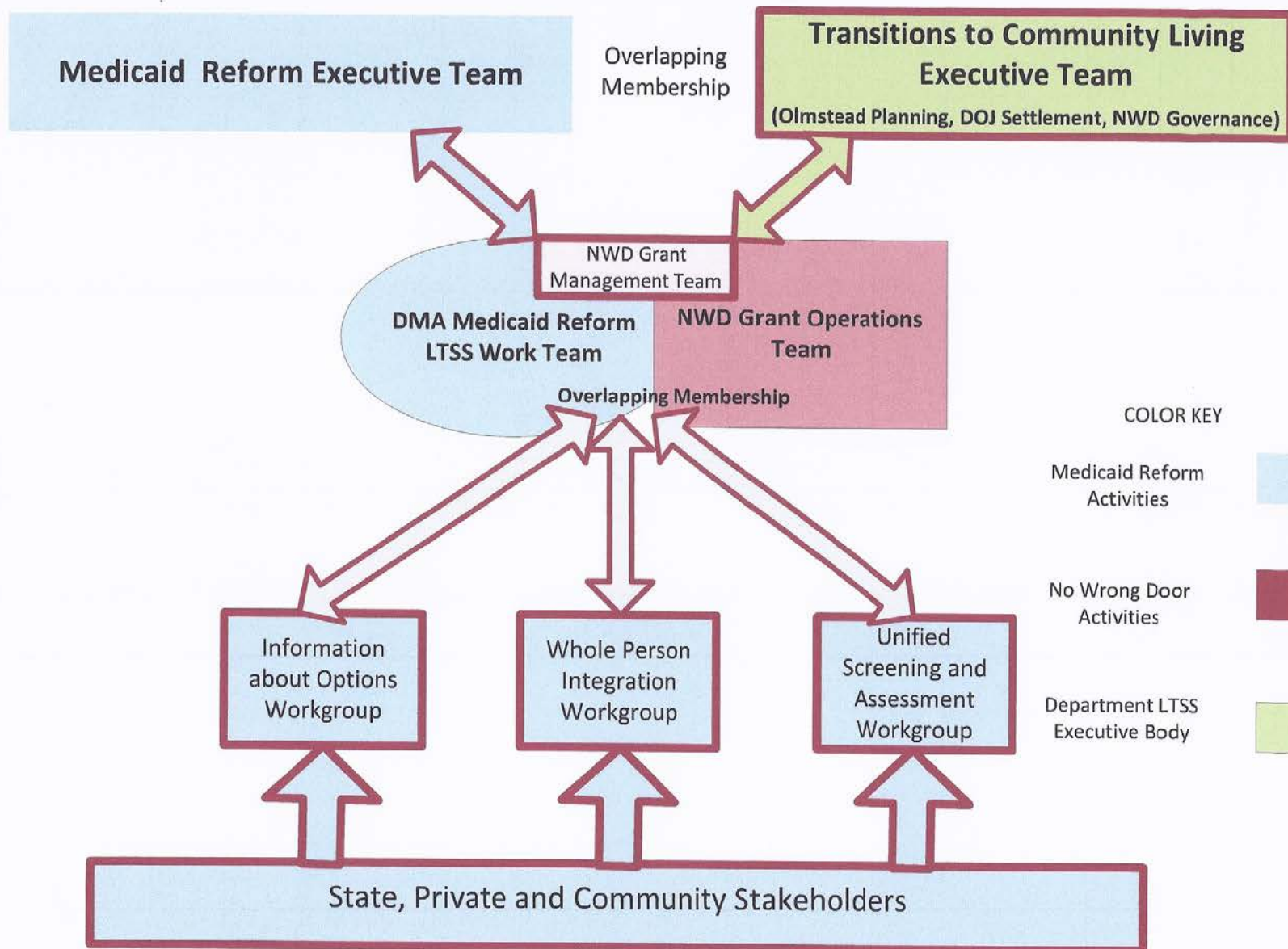


# NWD Grant

- A 12-month planning grant to develop 3-year implementation plan
- Have a single, statewide NWD system for ALL populations and ALL payers
- Functions of the system include:
  1. Public outreach & coordination with referral sources
  2. Person-centered Options Counseling
  3. Streamlined access to public LTSS programs
  4. State governance and administration

# NC NWD Grant Organizational Structure

## NC DHHS Secretary-Level Initiatives



# Information on Options Workgroup

## Scope of Work

Recommend the design and operating structure of NC's NWD System that ensures individuals:

- Have clear access to information about all service options available
- Access information at the places “they already go” including DSS offices, hospitals and other facility and community locations
- Have access to a “real live human being” who assists them in understanding the options available to them; developing the person-centered plan; navigating them through the various service enrollment processes and “staying with them” until they are effectively linked with key services
- Can access clear information and conduct preliminary self-screenings online

# Scope of Work

## continued

Recommendations should be identified and synthesized based on:

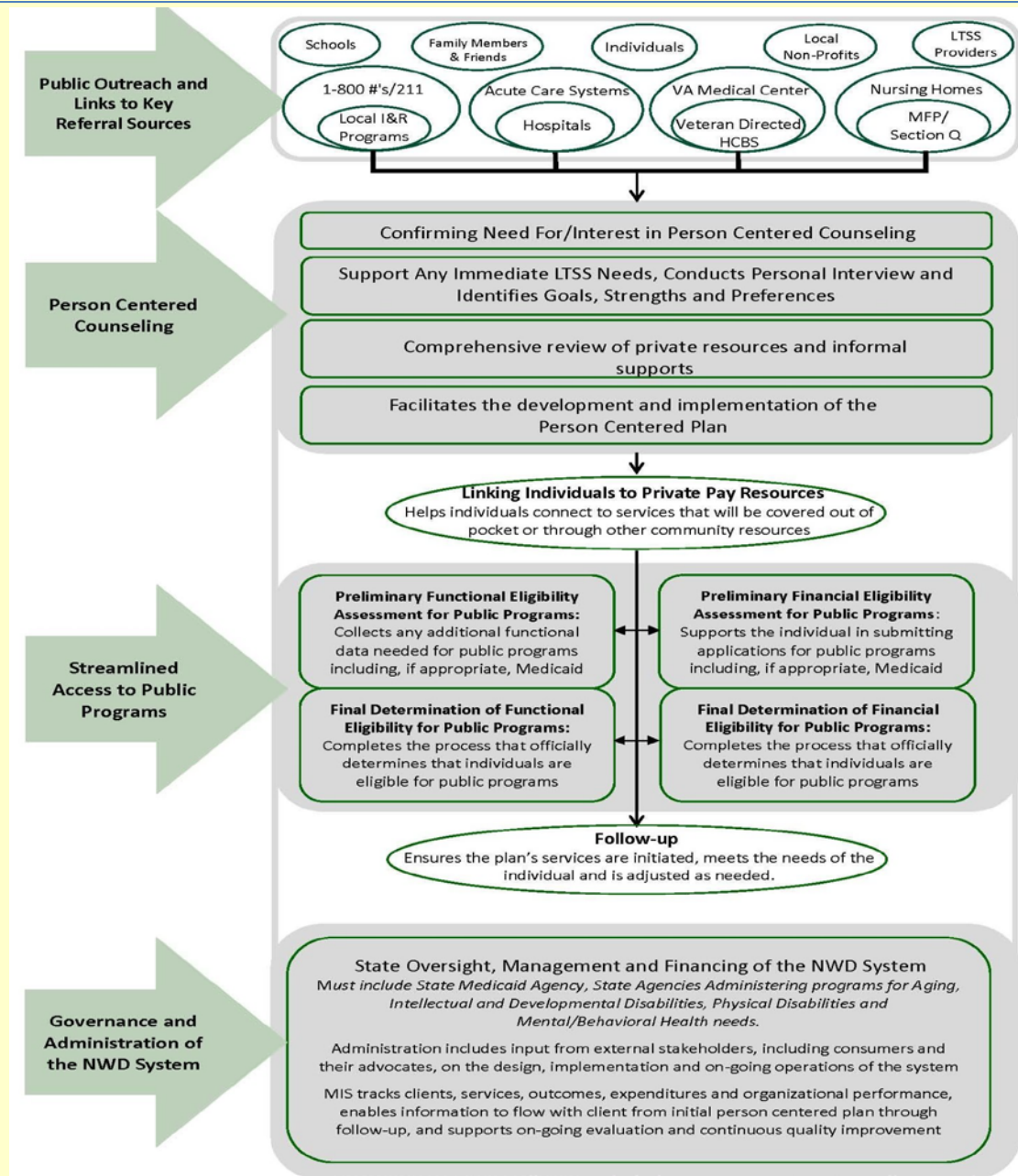
- current data
- existing options counseling programs, and
- nationally recognized best practices

# Workgroup Agreements

- We understand that our role is to help inform the Department's recommendations for Information about Options for LTSS beneficiaries
- We agree to set and reinforce a meeting tone that encourages thoughtful collaboration and the contribution of each member
- DHHS staff will try our best to get resources out in plenty of advance notice

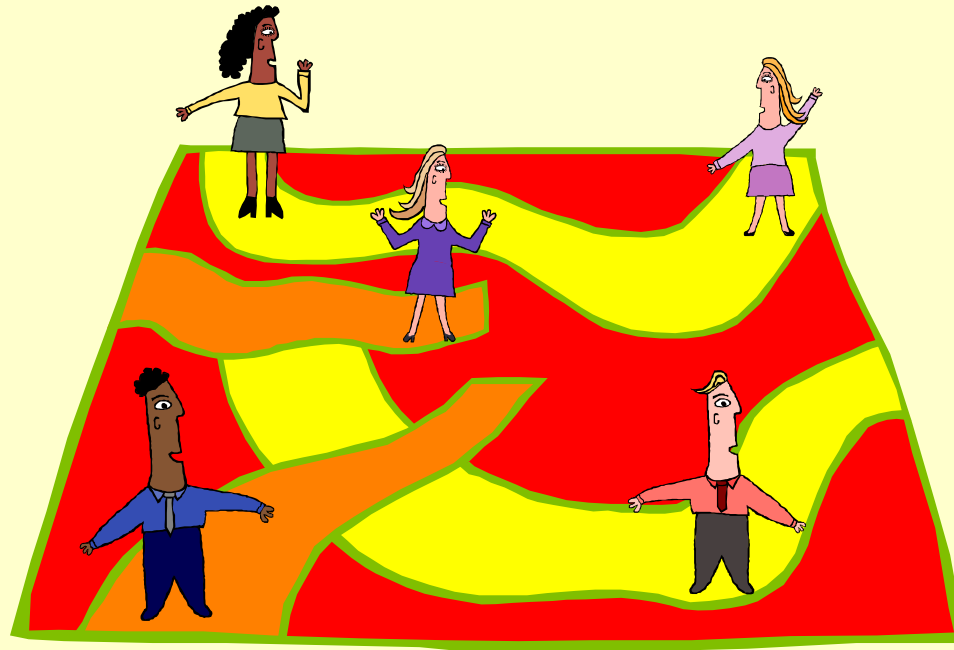


# National No Wrong Door Vision



# Options Counseling Video

# Options Counseling in North Carolina...



...Sounds Like a Plan



# Background

- 2003: Original ADRC program announcement
- 2008: Identified six core competencies for Options Counselors
- 2010: AoA funded Options Counseling grants
- 2014: Information & Options Counseling through Home & Community Care Block Grant (HCCBG)

# What Is Options Counseling?

A decision-support process that includes:



Listening to expressed preferences, values & needs



Talking about options based on needs & preferences



Giving support to person to make informed choices



Connecting the person to services



Following up with the person

# Options Counseling

- Options Counseling is an interactive process where individuals receive guidance in their deliberations to make informed choices about long-term supports. The process is directed by the individual or his/her legal representative, but may include others the individual or legal representative chooses to be present for the discussions.
- Regardless of representation, the individual to be served through Options Counseling shall be involved in the process to the greatest extent possible.

# Purpose of Options Counseling

- Using person-centered practices, provide decision-support so that an individual can make informed decisions about appropriate long-term services and supports options





# Options Counseling Components

- Personal Interview
- Decision Support
- Action Plan
- Follow-up





# Specific Features of Options Counseling

- An in-person meeting (unless declined by the individual) that includes and is centered on the person needing support
- A focus on long-term planning, using an interactive, decision-support process to weigh the pros and cons of options
- In-depth exploration of private and informal resources
- The person needing supports takes the lead in creating and carrying out his/her Action Plan
- Follow-up takes place at an agreed upon time with the individual, typically within 1 month but no longer than 3 months after creation of the Action Plan



# Options Counseling

- It is a person-centered, interactive, decision-support process
- It takes more time than traditional information and assistance services
- It involves in-person meetings and can include family members
- It includes documenting decision-support provided and action steps for the individual
- It is guided by standard operating procedures
- It involves tracking consumer outcomes over time

# Options Counseling is NOT:

- A single event
- Crisis management
- Case Management



# Becoming a Certified Options Counselor



# National Core Competencies

- Determining the need for Options Counseling
- Assessing needs, values and preferences
- Understanding and educating about public and private sector resources
- Demonstrating respect for self-direction
- Encouraging future orientation
- Following up

# Options Counseling Training

- Options Counseling On-line Training:
  - Options Counseling Concepts and Standards
  - Interviewing: Working with Individuals and Families Toward Change
  - Resource Basics
  - Cultural Competency & Health Literacy
- SHIIP
  - Web-based
  - Covers Medicare, Medicare supplements, Medicare Advantage, Medicare prescription drug plans, long-term care insurance, other health insurance concerns.





# Options Counseling Training

- Person-centered Thinking Training
  - Highly interactive two-day event
  - Provides effective new tools for working with individuals and their families
- Systems Advocacy Training
  - A one-day training that covers:
    - Aging and disability-related federal laws and professional ethics
    - Concepts of person-centered planning
    - Self-advocacy and how to support an individual's self-advocacy

# Options Counseling Snapshot

- 171 individuals have successfully completed OC certification training
- 30 individuals are currently in training
- 51 individuals are inactive
- 27 Options Counselors in their second two-year certification period





# Lessons Learned

- A combination of online and in-person training works well
- Securing funding sources (i.e. HCCBG) builds the program and expands service
- Some degree of turnover of Options Counselors is inevitable
- There needs to be dedicated positions for conducting Options Counseling

# Next Steps

- Map process flow
- Validate core functions of Options Counseling
- Determine qualified entity structure (i.e. which type of org will be providing)
- Establish which populations will be served
- Analysis of current curriculum design
- Determine rate structure
- Establish preliminary implementation schedule