

CONNECTIONS TO COMMUNITY LIVING SUSTAINABILITY INITIATIVE OPERATIONAL GUIDE SERIES #3

Topic: ADRC Role with the Money Follows the Person (MFP) Demonstration Grant

The purpose of this memo is to provide information and guidance to Aging and Disability Resource Centers (ADRCs) about the Money Follows the Person Demonstration grant and the role and responsibility of the ADRC in providing information, obtaining consent, and notifying the Department of Family Care enrollments or IRIS referrals for persons interested in relocating to community based settings.

INTRODUCTION

In January 2007, the Department was awarded a Money Follows the Person (MFP) Rebalancing Demonstration grant. The MFP Demonstration, per federal law, supports State efforts to:

1. Rebalance long term support systems while supporting individual choice of living situation. This includes a move away from the use of institutions towards greater choice for community based supports and services;
2. Transition people from institutions to community based settings; and
3. Promote a person-centered, needs-based, quality-driven system of long term care.

Under the demonstration, Wisconsin receives enhanced federal match for each qualifying person's first 365 days in the community. At current rates, Wisconsin will receive roughly 80% match, an increase of about 20% Federal Medical Assistance Percentage (FMAP). The demonstration continues through 2016. Although the ADRC does not directly receive the enhanced match, the benefit to the overall Medicaid program is significant.

PARTICIPANT ELIGIBILITY

For the State to be eligible for Money Follows the Person enhanced FMAP, an individual must meet the following eligibility criteria:

1. ***Pre-Relocation Eligibility Criteria.***
 - a. The person must have resided in a qualifying institution for at least 90 days. Medicare skilled rehabilitation days cannot be included in the 90-day period, but Medicare skilled nursing days can be counted.
 - b. Qualifying institutions include:
 - i. Nursing home,
 - ii. Intermediate care facility for the mentally retarded (ICF-MR), or
 - iii. Nursing home Institute of Mental Disorder (IMD) if paid by Medicaid (if resident is under 22 or over 64)

- c. The person must receive Medicaid benefits for institutional services for at least one day prior to relocation.
2. **Long-Term Care Eligibility.** The person must meet Family Care, Partnership, PACE, or IRIS functional eligibility at the nursing home or non-nursing home level of care.
3. **Eligible Living Arrangement.** The individual must relocate to an eligible living arrangement to qualify for MFP. Eligible living arrangements include:
 - a. A house owned or leased by the individual or individual's family member;
 - b. An apartment with an individual lease and where the individual or the individual's family has domain and control;
 - c. An adult family home (where no more than four unrelated individuals reside); or
 - d. Certain Residential Care Apartment Complexes (RCACs) where an individual has a separate key to the apartment and signs a lease separate from the service agreement.

People can be enrolled in managed care programs while they are in the nursing home or ICF. The start date for people who select IRIS will be the date of the individual's relocation (the discharge date).

PARTICIPATION DOCUMENTATION

The federal requirements for documentation for each MFP participant and the responsible party in Wisconsin include:

1. **Informed Consent Form.** Because the MFP Demonstration measures the efficacy of rebalancing efforts, information gathered related to participation requires consent from the person or his/her guardian. Individuals can rightfully decline participation but consequently will not be counted for MFP enhanced match. The person remains eligible for relocation. The informed consent form can be found at: <http://www.dhs.wisconsin.gov/forms1/f2/f20941.pdf>. **Responsibility: ADRC.**
2. **Quality of Life Survey.** The survey collects information about the person's satisfaction with his/her living arrangement, access to care, community involvement, health and well-being. The survey provides important information to the United States Congress regarding the MFP Demonstration. The survey is voluntary; therefore, a person can refuse to complete the survey and remain in MFP. Generally, surveys are completed prior to leaving the institution and repeated one and two years after relocation. **Responsibility: MCOs or IRIS contracted agency.**
3. **Participant Reporting Form.** Information gathered on this form allows for accurate identification by the Department of the person as a Money Follows the Person participant. **Responsibility: MCOs or IRIS contracted agency.**

ADRC ROLES AND RESPONSIBILITIES

The ADRC plays a significant role in relocating people from institutional settings to the community. ADRCs market and provide outreach to nursing homes, ICFs-MR, and the residents, themselves; respond to MDS-Q and other referrals from nursing homes each month; discuss people's options for community placement; discuss options for payment; and enroll people in long-term care programs that might be needed for a person to relocate to the community.

In addition to these activities, the ADRCs are now required to perform some additional duties related to Money Follows the Person. The additional responsibilities identified below, related to MFP, are intended to be easily incorporated into processes already used by the ADRC.

A. Discuss the Money Follows the Person Demonstration

During enrollment counseling with a resident who appears to be a candidate for MFP because the person decides to enroll in managed care or to be referred to IRIS because they want to relocate back to the community, the ADRC must explain the MFP grant to the person.

A DHS informational sheet developed for customers can be used as a script by the ADRC to describe the MFP grant in a consumer friendly way. This informational sheet is attached to these guidelines.

The ADRC will not know whether the person will relocate to an MFP eligible setting, nor does the ADRC guarantee specific placements. Information about MFP and the request to obtain informed consent, as described below, should occur with every potential relocation. When discussing MFP eligibility requirements with the individual, the ADRC staff should reiterate his/her role and discuss next steps. If the person does not want to participate in MFP, it will not affect a resident's discharge, long term care enrollment or transition to the community.

B. Obtain Consent

Informed consent is required to participate in the MFP demonstration grant. The consent form (F-20941) can be accessed at: <http://www.dhs.wisconsin.gov/forms1/f2/f20941.pdf>. The ADRC is responsible for explaining and completing the consent form with the person. The individual can decline to sign the form. This will in no way affect the individual's ability to relocate or access public funding for long term care.

It is possible the person will consent to participate in MFP, but in the end, may not be eligible for the MFP grant due to the choice of living arrangements or other reasons. Again, this does not affect the person's relocation; it only means enhanced federal match cannot be claimed for the person.

Note: The other required documents for MFP (quality of life surveys and participant reporting form) are completed by the MCO or IRIS consultant agency.

C. Notify the Department

1. **Managed Care.** When any individual residing in a nursing home or ICF chooses to enroll in managed care, the ADRC should send a secure copy of the **enrollment form** to MFP@wisconsin.gov or fax to 608-266-5629 at the time the enrollment form is signed. If the person also signed the **MFP consent form**, the ADRC should fax/e-mail the form to MFP at the same time.

The ADRC should send enrollment forms for all potential relocations, regardless of whether the person is eligible for MFP.

In addition to sending the consent form to the Department, the ADRC should also forward a copy of the MFP consent form to the Managed Care Organization.

2. **IRIS.** When an individual residing in a nursing home or ICF is referred to IRIS, the ADRC should send a secure copy of the person's **IRIS referral form** and **MFP consent form**, if applicable, to MFP@wisconsin.gov or fax to 608-266-5629.

In addition to sending the consent form to the Department, the ADRC should also forward a copy of the MFP consent form to the IRIS Consultant Agency.

3. The ADRC should send the enrollment/referral form and MFP consent form to the Department upon completion, or as soon as practical. The sooner the forms are sent, the more probable it will be for the Managed Care Organization/IRIS Consultant Agency and Department staff to secure needed paperwork and begin working on the transition to the community.

Department staff working with the Money Follows the Person demonstration grant will be the recipient of this information. The information from the enrollment/referral form is used to communicate to the Managed Care Organization or the IRIS Consultant Agency of the likelihood of MFP eligibility and to remind them that the member should be flagged for MFP so the discharge date and other related information is reported.

SUMMARY OF ADRC ACTION ITEMS

1. Provide information to potentially eligible customers regarding MFP, using attached informational sheet, when providing enrollment counseling to people interested in relocation.
2. Complete the MFP consent form with individuals who agree to sign. The form is found at: <http://www.dhs.wisconsin.gov/forms1/f2/f20941.pdf>
3. Forward a copy of the MCO enrollment form/IRIS referral form *AND* the MFP consent form to the Department (using MFP@wisconsin.gov or fax 608-266-5629) and to the MCO or IRIS Consultant Agency.

ADDITIONAL INFORMATION**References:**

- Money Follows the Person Information Sheet (attachment)
- Link to the MFP consent form F-20941: <http://www.dhs.wisconsin.gov/forms1/f2/f20941.pdf>

Office for Resource Center Development Contact:

Regional Quality Specialist(s) or send an email request to DHSRCteam@wisconsin.gov.

Money Follows the Person Contact: Donna Siedschlag at (608) 267-7131 or e-mail Donna.Siedschlag@wisconsin.gov for further information.

MONEY FOLLOWS THE PERSON INFORMATION FOR CONSUMERS

What is Money Follows the Person?

Wisconsin participates in “Money Follows the Person,” a federal demonstration grant. The grant provides Wisconsin with additional federal money which is used to support home and community-based options for people living in nursing homes or other institutions. The grant does not provide payments directly to people, but when a person participates, it helps Wisconsin have additional resources to support people to live in home and community based settings.

Who is Eligible?

You may be eligible if you are:

- elderly or have a disability, and
- have been a resident of a nursing home or intermediate care facility (ICF) for at least 90 days*, and
- are eligible for Medicaid, and
- relocate to a small community setting, such as an apartment, home, with family, a small group setting with four people or less, or an apartment in some Residential Care Apartment Complexes (RCACs).

How Does It Work?

- ***Learn About Your Options and Begin the Relocation Process.***
A person from the Aging and Disability Resource Center (ADRC) will explain to you and your family the options available for your relocation to the community. After you make a choice about which program you would like to use to help you relocate, the ADRC will refer you to that program to begin planning for your move to the community.
- ***Decide Whether to Participate.*** When you meet with the ADRC, they will ask you whether you’d like to sign a consent form. Your consent is necessary for the state to include you in the Money Follows the Person program and get federal funds. You can decline to sign the form. ***Choosing not to participate will not affect your discharge and transition to the community.***

* A person who has resided in the facility for at least 90 days is considered long-term. Some rehabilitation stays funded by Medicare may not count in the 90 days.

It is possible you will consent to participate in Money Follows the Person, but in the end, may not be eligible. Perhaps this is because your new home is not one of the eligible settings and you didn't know that at the time you sign the consent form. That's ok. Again, this will not affect your relocation to the community.

- ***Tell Us About Yourself and Your Experience.*** If your services are eligible for Money Follows the Person, and you consent to participate, the state and federal government would like to know how well the Money Follows the Person process meets the needs of people like yourself. Therefore, we would like you to take a brief survey before you relocate and another survey after one and two years of living in the community. The survey will ask you questions about your satisfaction with your living arrangement, your access to care, your community involvement, your health and your well-being. Your information and feedback is very important!

You will be asked to participate in the surveys at a later date, which you may also decline at that time. The first survey will be done while you are in the facility, and will be done by a person from the program you selected to help you relocate.

Want More Information?

If you'd like more information, you can visit the Wisconsin Department of Health Services' website at: http://www.dhs.wisconsin.gov/ltc_cop/MFP/MFP.htm or contact the Department with your questions at: MFP@wisconsin.gov or 608-267-7131.