

Unbundling Day Services IDD Workgroup

11 AM – 1 PM
7/5/2023

Meeting Attendance

| Organization | Representatives |
|-----------------------------------|---------------------------|
| WSU | Zane May, Cy Rogers |
| KDADS | Robin Lohman, Seth Kilber |
| Capper Foundation | Ramona Macek |
| Happy Hearts | Carol Farnsworth |
| United | Carrie Kimes |
| Mosaic | Ambrosia Belchic |
| Johnson County CDDO | Judie White |
| ECKCDDO | Jacquallynn Branch |
| Riverside Resources, Inc. CDDO | Janice Denney |
| Life Patterns, Inc | Jon Gerdel |
| Day Service Director for Lakemary | Brooke DeNegri |
| Parent Advocate | Kathy Keck |
| The Arc of Douglas County | Angie Reinking |
| The Treehouse | The Treehouse |

Welcome/Introduction

Agreements Suggested:

- That we will be respectful of each persons' input
- The workgroup not be "top down" but rather have a collaborative space for everyone to share feedback equally
- Welcome new ideas and think outside the box

Workgroup Background

Notes from meetings will be sent out after the first round of meetings. Once the first round of meetings has been completed the notes will go out and will be posted on the website. Participants will be able to provide comments on these notes and other groups work. These comments will be folded into the next notes.

Purpose & Resources

Many day services in Kansas have different types of day programs. Many other states have "unbundled" these day services into separate service codes. KDADS has received guidance from CMS that Kansas should do this, also. This is to help increase

transparency, improve billing, and ensure individuals are getting the services they need. It would also help with persons-served getting the most individualized services possible.

Group considered whether meetings would boil down to developing billing codes for services and agreed this is mostly accurate but would require defining services as well and some other work.

Group questioned whether “employment supports” are something to include in the process as day becomes unbundled. There is a separate “employment” group. There are day services and supported employment. This group is meeting to break down the day services further to identify the steps between regular day and habilitation type supports to complete supported employment.

Group acknowledged that unbundling seems as if service delivery is going back to how it was in the nineties.

Group discussed billing challenges stemming from current codes. It’s important that we understand there is real value in us separating these services out and knowing where we are billing and spending money in Kansas.

A group member outlined that this is a great opportunity for day services with older persons-served that they may not want to utilize typical day services.

Group discussed opportunities to look at changing reimbursement rates. There will need to be some looking into what these rates need to be reimbursed at. That is not off the table for this group.

Group discussed how the day would be broken down for the people receiving services. This could lead to confusion and a lack of services being tracked accurately by staff. Group discussed that it would come down to individual need and would require knowing what services people are authorized to receive. Some of this work will require looking at what other states have done. Group member mentioned that when this is unbundled and there are separate codes for different services then each service will be tracked and billed individually.

Group member shared concern that there are limited licenses and rates that people depend on to stay in their homes and live as they want to/have been.

Group member described how there is angst around change and that there would be different levels of reimbursement and challenged the group to think differently and put the individual back in the center of the plan. For example, Person A needs higher support, the rate would be higher no matter what service is provided. This has potential to be a quicker way to categorize things and if we continue to tie rates to service types we will continue to see what we are seeing from providers. If we shift rate from service to what the individual requires it could be beneficial.

Group member stated that when there is a good mechanism for providers to get paid for the service they are providing it helps build capacity and incentivize providing the service.

Group member outlined that self-directed day service is a good thing. Something else to consider is to think about the purpose of day services. Sometimes “day service” doesn’t happen during the “day,” and when that word is in there it stifles some of the innovation and options. We are limiting when we think of it as “day” only.

Group member stated that consistent transportation and funding is important to fully supporting persons-served in their goals. Having adequate funding to support these goals and this work is essential.

Discussion

What other resources does this group need access to in order to do this work?

- Descriptions of the different waiver services that are offered in different states. Brooke DeNegri has begun this work.
- Current utilization of each of day and supported employment services.
- Identifying what core programs day providers in other states are offering.
- A way to identify individuals who aren’t in the supported employment group but do need check-ins.
 - Does this need to be broken into a second service? What is priority in development of a new service?
 - Community access happens under “day” and OH, WI, and TN refer to this in some ways.

Individualized rate setting (topic raised by group during discussion)

- There is a trend in Johnson County that the PCSP has become a reflection of the BASIS instead of the wants and needs of the person. Having a more dynamic PCSP that reflects wants, needs, and desires is a good start to addressing this.
- Rates that don’t reflect the level of care needed makes it difficult for the provider to hire and support people the way they need to. A possible solution is setting individual rates for the person based on their needs.
- Moving to a member-based rate structure vs. code-based structure, how does KDADS go about setting rates for the members on the waiver?
 - Could be a base rate for the service to a tier 3 level person. Then it is added to when persons-served needs are higher.
- Have heard that Arizona allows the provider to negotiate the rate with the payor. This is not necessarily a suggestion as it sounds very difficult.
- It might be easiest that BASIS determines your getting services but that if you require 24/7 you might get an increased rate. The tier system has issues.

What are the employment services, or service outcomes, that will be essential to Kansans on the IDD Waiver?

- Figure out a way to incentivize employment for those with more significant disabilities.
- Medical exceptions should be re-visited. Some conditions last forever and looking at improving this policy could be helpful for many people.
- We can't forget customized employment piece for medically fragile, higher needs populations.
- TN has listed their community integration support services. Would cover employed and non-employed.
- Make sure we recall what community integration means. "Non-agency-based community integration."
- Supported employment/small group settings.
- The only thing missing from the other states are options for retired aged folks. Kansas might have some of these providers.

What are the non-employment services that will be essential to Kansans on the IDD waiver?

- As we know many people who are competitively employed are not employed full time. So, we need an option to bill for their day in parts that reflect their day.
- There is a need for a hub that outlines accessible restrooms in the community and other community supports.
- Does CMS have priorities that we should consider?
 - Final Rule and reducing reverse integration.
 - Not everyone has a full grasp of what options are available to them.
- Regarding Community integration, are the limited opportunities available FOR integration. Events do not often happen during traditional day service hours; Smaller towns are limited as to what is available. Not all are able to go to Wichita, or Topeka.

Closing Questions

What would make our next meeting a success?

- Agree on four areas of service
- Map out what we want the services to look like
- Have a list of potential activities to consider
- Mapping out categories
- Exploring individuals working at, and starting, small businesses for individuals and how that can be supported
- What we want services to accomplish, what areas they are in, and what the services are would make a successful next meeting
- Providers in general will get anxious about this discussion but reminding people what is billable. Make it clear in the definitions that you bill the times that are billable
- Discussing the barriers to community integration is a valuable conversation to have for individuals with differing needs

- The state will work on pulling together utilization data, but we need to know what is needed
 - How many are using day
 - How many are using supported employment
 - Goal is to give us a starting place
 - Are there providers providing a la carte services and doing self-pay would be useful data

Wrap Up

- Seth will pull together utilization data before next meeting
- Brooke will send information to Cy and Cy/Zane will disseminate that information to the group
- Next meeting: What we want services to accomplish, what areas they are in, and what the services are would make a successful next meeting
- Zane will send a Doodle Poll after this meeting for end of July.

Unbundling Day Services IDD Workgroup

10 AM – 12 PM
7/25/2023

Meeting Attendance

| Organization | Representatives |
|--------------------------------|---------------------------|
| WSU | Zane May, Cy Rogers |
| KDADS | Robin Lohman, Seth Kilber |
| Life Patterns | Jon Gerdel |
| Happy Hearts | Carol Farnsworth |
| Riverside Resources, Inc. CDDO | Janice Denney |
| Lakemary | Brooke DeNegri |
| Johnson County CDDO | Judie White |
| Capper Foundation | Ramona Macek |
| The Treehouse | Karey Padding |
| United | Carrie Kimes |
| | Trish Farrington |
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Welcome/Introduction

- Utilized Jamboard as an icebreaker and to teach group how to use Jamboard.
- Provided overview of the agenda for the day.

Review Agreements & Considerations

Agreements

- Meaningfully engage
- Focus on solutions
- Not changing isn't an option
- Be respectful of each person's input
- Be a collaborative space for everyone to share feedback equally
- Welcome new ideas and think outside the box

Considerations

- How services can support people who have reached retirement
- How services can support people outside of traditional 8-5 business hours

There was a request for federal guidelines to be shared with the group. KDADS informed that there is not a specific federal guideline that needs to be followed, just that Day Services need to be broken down more appropriately. This means nothing is off the table now, but definitions are necessary to move forward.

Review Utilization Data

For the period of 7/1/22-6/30/23:

- Total number of people on the waiver = 8906
- Number receiving day supports = 6201 (average units 1120)
- Number receiving supported employment = 200

Waitlist numbers are approximately 5100 according to Johnson County CDDO

Average wait time is approximately ten years right now

A participant said that the wait time is unacceptable and mentioned that IDD waivers are great but if people can't get on them, it defeats the purpose. A participant asked why the waitlist isn't being addressed first. KDADS informed the group of a KDADS FMAP initiative studying the waitlist and waitlist needs to report to the Legislature. More information will be made available when the study is complete and reported.

Review Other State's Service Descriptions

WSU provided an overview of other states' service areas, including Maryland, Missouri, Ohio, Tennessee, Wisconsin

A participant noted that Tennessee "Community Integration Support" is good. The same participant does not like the term "adult day care" but does like "Day Rehabilitation." This was echoed by multiple other participants.

Another participant noted that Tennessee calls out daytime and nighttime in their wording.

A participant noted that "medical care" will need to be addressed at some point and how they may not be able to meet the definition of day support due to needs. These needs are currently met under bundled day services

An attendee noted that Maryland addresses the need for medical supports.

A participant asked how the states were chosen for these workgroups.

WSU informed the room that the states were chosen with consideration to their delivery model, geographical size and type (population, rural vs. frontier and urban), and other states that have systems that have been highlighted for effectiveness.

Outline Services for Kansas

Service Area Vs. Service Category. We are not discussing geographic areas. WSU offered that areas might be activities of daily living, and another might be community membership, for example.

WSU: This group will not focus on work/employment related services as there is another group focusing on employment specifically. The group agreed that pre-vocational work is appropriate to include in unbundling day services.

A participant asked if transportation could be considered a service area. Multiple other states have incorporated transportation into the definitions. This was echoed by others in the room.

One service could be education or training that would include daily living skills.

Community Enclave: small group that goes out and works, would get paid by employer and there is a supervisor (unpaid by employer) to provide support. Typically, 3-10 people based on work site

Categories identified in Jamboard:

- Daily Living Skills
- Retirement Age Supports
- Medically Fragile/Medical Care Supports
- Vocational Employment Options

Participant: Ohio's definition on participant rehabilitation captures a lot.

Typically, school-aged children don't qualify for day services and qualify for PCS. Could this change? KDADS said the State would have to look at CMS guidance to see if day services for children is something they would even consider approving. KDADS/Seth will check.

Participant asked if hours and funding for day services are being adjusted. KDADS will welcome looking at all changes possible and using fresh eyes. The bare minimum is to make a recommendation on unbundling day services, but KDADS would not stop the group from making larger, systemic change recommendations. On a multi-year birds-eye view we could see this as an iterative approach

KDADS informed the group that there hasn't been a determination regarding how many billing codes are needed. The technical requirements and billing codes will be designed later with technical assistance and input from additional partners.

An attendee noted that there will be some people who fit under multiple sides of the Day Services. So, we are talking a lot more about tracking the Day Services. You might have some people who go to employment a couple days per week and then have some who are community living the rest of the week possibly others depending upon what other categories are decided upon. Which means the provider then must do more tracking to show the billing for each code.

Group broke service areas into two larger categories: Skill Development/Quality of Life and Skill Development/Vocational. The group noted that “quality of life” is an important piece to include. Participants should be able to be fluid between these categories. This allows more choice for participants and flexibility in how they plan their days. Additionally, unbundling does present a challenge with fluidity because we are person-centered.

A participant requested the group keep in mind the limited licenses as well who are self-direct. There are over 30 of those at least. The participant said the Skill Quality of Life fits the majority of Limited Licenses. However, there are quite a few that have employment as well.

Participant noted a grave concern with different rates and different codes. If rates are separated and changed it could have the impact that limited licenses may not be able to live in their own homes and have self-directing services. This is also impactful to the workforce (which is already difficult).

Intersection and overlapping of the categories is critical. Participants should not be siloed into one category.

Brooke has a visual for how this might work and will develop a way this might look and provide it to the group at the next meeting.

Closing & Next Steps

Group would like to see visual prior to next meeting.

Some service definitions brought under categories that were developed on the Jamboard would be beneficial.

Having a barriers list could be important. Without this list it could be messy.

WSU requested that the participants look at the service definitions from other states before next meeting to come with activities or ideas for the next meeting.

KDADS/Seth will look into CMS guidance to see if day services for children is something they would even consider approving.

Unbundling Day Services IDD Workgroup

10 AM – 12 PM
8/16/2023

Meeting Attendance

| Organization | Representatives |
|-----------------------------------|---------------------------|
| WSU | Zane May, Cy Rogers |
| KDADS | Robin Lohman, Seth Kilber |
| Capper Foundation | Ramona Macek |
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| Life Patterns, Inc | Jon Gerdel |
| Day Service Director for Lakemary | Brooke DeNegri |
| Parent Advocate | Kathy Keck |
| The Arc of Douglas County | Angie Reinking |
| | Leslie L |

Review Jamboard & Other Notes

A participant wanted to ensure that the categories are not so broad that they don't include things. Wanted to ensure community engagement and community opportunity is included.

We need to make sure that the areas aren't exclusive of each other, also.

In last meeting there was a struggle to put ideas together due to overlap, the VENN diagram was designed to show where individuals might overlap with services.

Individuals should be able to cross areas on their need. For example, go from life skills into vocational skills and back if they need. Another thought: how do we make sure that we build a structure that supports the needs of the person despite the area they are existing in?

The Venn diagram is fantastic and will be much better with clear service definitions. The overlap makes coding and billing easier.

When these services are unbundled it allows the individual receiving services to have different providers across these services if they want. This would provide flexibility and person-centeredness.

Specialized behavioral can fall onto this chart in the yellow circle. Participants wanted to ensure it was included.

Where does supported employment fit? Does it fit under vocational skill supports? Participants want to ensure that there is potential for actually working and not working towards working

KDADS – one of the groups is supported employment, what we are looking at here is someone who can move from the left side of the diagram to the right side of the screen. The supported employment piece would be separate from the work we are doing here today

Support for community jobs was not included here because it would be covered on supported employment. Everything on the venn diagram is pre-vocational

Including something about supported employment could be useful to minimize confusion and keep from pitting Day Services and Supported Employment against each other

The goal for individuals is always employment whether pre-vocational or one hour a week somewhere. It is critical to have employment be a part of this chart. This was echoed by many in the room.

Doesn't need to include on visual but having supported employment on this document as a table or nearby would be useful and illustrative when considering a persons whole day. Supported employment should be listed here somewhere. The group felt it was important to capture this even if it isn't being worked on

A participant thought of these supports as what people need to get to employment.

Maybe label as Pre-Vocational Skills Support. This gives room for individuals to have employment but this is what you're doing in addition

Changes will be made and sent out

The group settled on pre-vocational skills support as a name.

The group settled on including "employment" on the document rather than "supported employment."

Descriptions for Service Areas

Enhanced Supports:

Should touch on all the services included on the venn diagram. Also important to reinforce individuals preference.

More individualized support but taking into consideration each individuals needs and age-related needs and technology needs. Important to note service provisions that fit for the individuals needs

Include age-related supports within Enhanced Supports

Proposed language: Individualized supports that take into consideration medical and behavioral needs, take into consideration age-related support needs, take into consideration location needs

Transportation is a barrier. It's a major issue and improving it would enhance the lives of persons served if it's explicitly noted that it is provided

Proposed language: Coordination of transportation within the individual's community

Many medically fragile people are in a gap and consideration should be made for them when services are being unbundled. Especially with the pandemic and individuals who have slipped just past the medically fragile definition

I would like to see the Enhanced Supports definition eliminate the need for a day service medical exception. I also wonder if care for individuals with dementia would fall within enhanced supports?

Looking at temporary and permanent medical exceptions is important here.

KDADS – Unbundling work will make it easier to go back and look at the process

I want to see an exception policy for day services that is more flexible and user-friendly and is still a process people need to go through and is the exception.

Suggested Language - Enhanced Supports are individualized supports that take into consideration a person's medical and behavioral needs, and age-related support needs. Services include the coordination of transportation within the individual's community with consideration to location needs.

Could be useful to include social skills under life skills. Would be useful to call this out more specifically

Life Skills suggested language –

Education and skill development to teach members the skills needed for community citizenship and involved in performing activities of daily living, including skills intended to increase members' independence, social skills, and engagement in community life that empowers members to live their preferred lifestyles.

Pre-Vocational Skills suggested language -

Pre-vocational skill supports are individualized supports to build on a person's interests and goals to expand their knowledge and develop skills that aim to prepare an individual for integrated competitive employment.

Would be useful to include transportation in this definition.

Transportation is all encompassing and I don't know if we need to write it in.

Should we consider non-job tasks and skills that are learned. Including safety, mobility, workplace conduct and dress?

Might be a way to incorporate current waiver definition into this definition

Would be useful to include "aimed at their vocational goal" to fit for each individual person

IMO, volunteering still integrates people into a competitive setting - we wouldn't have volunteers at a sheltered workshop.

What if we add to the end "competitive employment or their individual vocational goal." This suggestion had some approval in the room.

KDADS – CMS has a more narrow view and that pre-vocational services are supposed to be time limited and ultimately have the goal of someone being competitively employed.

What about including vocational milestones? This had some approval in the room.

Suggested language: Pre-vocational skills supports are individualized supports to build on a person's interests and goals to expand their knowledge and develop skills that aim to prepare an individual for integrated competitive employment through the obtainment of vocational milestones.

Consensus around going back to vocational skills (remove pre) and add "obtainment of vocational milestones" at the end. "Obtainment of vocational milestones" would replace "aimed at their vocational goal."

I still don't like integrated. Competitive employment covers it. Integrated, competitive is redundant. There is no consensus around this. There was pushback in the room that integrated and competitive mean very different things.

Suggested language –

Vocational skills supports are individualized supports to build on a person's interests and goals to expand their knowledge and develop skills that aim to prepare an individual for competitive integrated employment through the obtainment of individualized vocational goals - There was consensus around this.

Wrap Up

Recommendation for service area descriptions:

Life Skills

Education and skill development to teach members the skills needed for community citizenship and involved in performing activities of daily living, including skills intended to

increase members' independence, social skills, and engagement in community life that empowers members to live their preferred lifestyles.

Enhanced Supports

Enhanced Supports are individualized supports that take into consideration a person's medical and behavioral needs, and age-related support needs. Services include the coordination of transportation within the individual's community with consideration to location needs.

Vocational Skill Supports

Vocational Skill Supports are individualized supports to build on a person's interests and goals to expand their knowledge and develop skills that aim to prepare an individual for competitive integrated employment through the obtainment of individualized vocational goals.

One more meeting is suggested

Notes and Venn Diagram will go out

Group will meet once more

This link was shared with the large group to help inform the work:

<https://www.govinfo.gov/content/pkg/CFR-2021-title42-vol4/pdf/CFR-2021-title42-vol4-sec440-180.pdf>

Day Services: Quality of Life services

