



# Creating the ADRC Business Case Options Counseling Survey

Guidance on Answering Questions



Copyright (c) 2018 Compelling Reason LLC. CONFIDENTIAL INFORMATION.

# Question 1

1A. In calendar year 2017, approximately how many consumers did you assist with decisions on long-term care or living situations for themselves or on behalf of others?

1B. What percentage of those consumers (or their family members), subsequently decided to delay their entry to nursing homes or other institutions (e.g., assisted living, residential care), and what percentage made no change? Of those who delayed entry to nursing homes or other institutions, how long, on average, could they delay?

Consumer's decision after assistance from ADRC	% of consumers (from 1A)	Average delay (months)
Delayed entry to nursing home by staying at home longer		
Delayed entry to nursing home by staying in other institutions longer		
Delayed entry to other institutions by staying at home longer		
No change in the consumer's planned living situation		n/a
Total	100%	n/a

1C. Are your answers to question 1B based primarily on records, primarily on your memory, or on both?

*How this data will be used:* For each row in the table, we will calculate Total Benefits = (# of consumers in 1A) x (% of consumers) x (Average Delay) x (savings/month).

# Question 1

Top table is from the checklist tool

Question applies to =>	Consumers that you assisted with decisions on long-term care or living situations			
Outcome =>	Delayed entry to nursing home by staying at home longer	Delayed entry to nursing home by staying in other institutions longer	Delayed entry to other institutions by staying at home longer	No change in the consumer's planned living situation
What to enter =>	estimated delay in months	estimated delay in months	estimated delay in months	X if no change
consumer 1	3			
consumer 2		4		
consumer 3				X
consumer 4			2	
consumer 5	9			
<b>Column Totals (# consumers)</b>	2	1	1	1
<b>Total consumers that the question applies to</b>	5	5	5	5
<b>Column total as a % of consumers that the question applies to</b>	40%	20%	20%	20%
<b>Average delay (months)</b>	6.0	4.0	2.0	n/a

Blue shaded entries are used in the bottom table

Consumer's decision after assistance from ADRC	% of consumers (from 1A)	Average delay (months)
Delayed entry to nursing home by staying at home longer	40%	6.0
Delayed entry to nursing home by staying in other institutions longer	20%	4.0
Delayed entry to other institutions by staying at home longer	20%	2.0
No change in the consumer's planned living situation	20%	n/a
<b>Total</b>	100%	n/a

Bottom table is from the survey

# Question 1

## ***Case example:***

- OC met with the Johnson family, seeking long term care options for their mother Helen.
- Helen resides in her own home and needs assistance with bathing, medication reminders, meal prep and ambulation outside the home.
- Helen's adult children would like to see her move into an assisted living facility for safety as they are concerned she has had previous falls and forgets to take her medication.
- OC talks to the family about the range of long term care options available, the costs and type of care provided through each option.
- Ultimately, after speaking with the OC, Helen and the family decide that bringing in additional in home care and supports described by the OC is preferable to an assisted living facility.
- At follow-up, OC noted that Helen is thriving in her home with the additional supports and there are no plans to seek placement outside the home.

## ***How to capture on the worksheet:***

Due to the OC intervention, this consumer delayed entry to other institutions by staying at home longer. She was seen by the OC in April of 2017, average delay for her calculated at 8 months, as there are no additional records through 2017 that note any change in living situation.

## Question 2

	# of consumers
2A. In calendar year 2017, approximately how many consumers did you enroll in Care Transitions programs in order to prevent hospital readmissions?	

2B. Is your answer to question 2A based primarily on records, primarily on your memory, or on both?

*How this data will be used:* We will calculate Total Benefits = (# of consumers in 2A) x (\$ per hospital readmission).

## Question 2

Question applies to =>	Consumers that you enrolled in Care Transitions programs
<b>What to enter =&gt;</b>	X if yes
consumer 6	X
consumer 7	X
consumer 8	X
consumer 9	X
consumer 10	X
<b>Column Totals (# of consumers)</b>	<b>5</b>

	# of consumers
In calendar year 2017, approximately how many consumers did you enroll in Care Transitions programs in order to prevent hospital readmissions?	5

## Question 3

3A. In calendar year 2017, approximately how many consumers who don't have an immediate long-term care need have inquired to you about housing options (apartment, home to rent, shelter, etc.) for themselves or on behalf of others?

3B. Of those consumers (or their family members), what percentage planned to enter each of the following housing situations, both before and after receiving ADRC guidance?

Planned Housing Situation	Before receiving ADRC guidance (% of consumers from 3A)	Within 90 days after receiving ADRC guidance (% of consumers from 3A)
Continued homeless		
Facing eviction		
Other		
Total	100%	100%

3C. Are your answers to question 3B based primarily on records, primarily on your memory, or on both?

*How this data will be used:* We will calculate Total Benefits = (# of consumers in 3A) x (% reduction of consumers that are homeless or facing eviction) x (value of housing in \$/month) x (months).

# Question 3

Question applies to =>	Consumers who don't have an immediate long-term care need that inquired to you about housing options					
Outcome =>	Planned Housing Situation before receiving ADRC guidance			Planned Housing Situation within 90 days after receiving ADRC guidance		
	Homeless	Facing Eviction	Other	Homeless	Facing Eviction	Other
What to enter =>	X if yes	X if yes	X if yes	X if yes	X if yes	X if yes
consumer 11	X					X
consumer 12		X				X
consumer 13			X			X
consumer 14	X					X
consumer 15		X			X	
<b>Column Totals (# of consumers)</b>	2	2	1	0	1	4
<b>Total consumers that the question applies to</b>	5	5	5	5	5	5
<b>Column total as a % of consumers that the question applies to</b>	40%	40%	20%	0%	20%	80%

Planned Housing Situation	Before receiving ADRC guidance (% of consumers from 3A)	Within 90 days after receiving ADRC guidance (% of consumers from 3A)
Continued homeless	40%	0%
Facing eviction	40%	20%
Other	20%	80%
<b>Total</b>	<b>100%</b>	<b>100%</b>

## Question 3

### ***Case example:***

- OC met with consumer George, he is currently living with his son who wants him to move out ASAP and into a care setting.
- George is completely independent, rides the bus to the community center to eat lunch and visit with his friends there.
- OC meets with George and discusses needs and preferences, ultimately discussing and giving resources related to low income housing.
- At follow-up George has moved into his own apartment.

### ***How to capture on the worksheet:***

This consumer was facing eviction before receiving ADRC guidance. 90 days after receiving ADRC guidance they were in an apartment, so an "X" should be marked in the "Other" column.

## Question 4

4A. In calendar year 2017, approximately how many consumers have mentioned themselves or a family member having a fall that resulted in hospitalization or other costs? [Also include consumers that attend fall prevention classes even if they haven't yet fallen.]

4B. Of those consumers (or their family members), what percentage planned to attend a fall prevention class (e.g. Tai Chi, Matter of Balance, Otago, or other community falls prevention program), both before and after receiving ADRC guidance?

	Before receiving ADRC guidance (% of consumers from 4A)	Within 90 days after receiving ADRC guidance (% of consumers from 4A)
% planning to attend a fall prevention class		

4C. Are your answers to question 4B based primarily on records, primarily on your memory, or on both?

*How this data will be used:* We will calculate Total Benefits = (# of consumers in 4A) x (increase in % of consumers planning to attend a fall prevention class) x (% decrease in emergency room visits) x (\$ per emergency room visit).

# Question 4

Question applies to =>	Consumers having a fall that resulted in hospitalization or other costs			
Outcome =>	Before receiving ADRC guidance		Within 90 days after receiving ADRC guidance	
	Planning to attend fall prevention class	Not planning to attend fall prevention class	Planning to attend fall prevention class	Not planning to attend fall prevention class
What to enter =>	X if yes	X if yes	X if yes	X if yes
consumer 16		X	X	
consumer 17		X	X	
consumer 18		X		X
consumer 19	X		X	
consumer 20	X		X	
<b>Column Totals (# of consumers)</b>	2	3	4	1
<b>Total consumers that the question applies to</b>	5	5	5	5
<b>Column total as a % of consumers that the question applies to</b>	40%	60%	80%	20%

	Before receiving ADRC guidance (% of consumers from 4A)	Within 90 days after receiving ADRC guidance (% of consumers from 4A)
<b>% planning to attend a fall prevention class</b>	40%	80%

## Question 4

**Case example:** “Call to Jane today. She states that she fell last week while getting out of the shower. She states that she was having significant pain in her hip, so she went to the ER for xrays – xrays showed no fractures. States she was not admitted, sent home. Expressed concern over paying for ambulance ride copay. No local resources available to pay for this, but did encourage her to work w/ the provider on a payment plan if she finds that the copay is more than what she can afford in one payment. States she purchased a tub-transfer bench to help with getting in/out of the shower. Encouraged her to attend Tai Chi classes at the Sandy Senior Center. Discussed other options for fall prevention. Discussed possible home health referral for a home safety evaluation. Encouraged her to contact her primary care doctor to see if a referral could be made to home health.”

**How to capture on the worksheet:** In this situation, I would not indicate that she was hospitalized, but that she did incur other costs associated w/ a fall (ambulance ride, tub-transfer bench). I would indicate that she was not considering attending a fall prevention class before ADRC guidance, and indicate that she was planning to enroll in Tai Chi classes after receiving ADRC guidance (along with other fall prevention activities such as a home health referral for a home safety eval).

## Question 5

5A. In calendar year 2017, approximately how many consumers have inquired to you about Financial Aid/Food/Health/Other Items of Value or Transportation for themselves or on behalf of others?

5B. Of those consumers, what percentage of the consumers (or their family members) were likely to receive some kind of assistance in those areas, both before and after receiving ADRC guidance? What is the average annual approximate value of the items that they were likely to receive?

Type of Assistance	Before receiving ADRC guidance (% of consumers from 5A)	Within 90 days after receiving ADRC guidance (% of consumers from 5A)	Average incremental value of assistance per year
Financial aid (e.g., help with paying utility bills, medications, etc.)			
Food (including food stamps)			
Health-related equipment & services (wheelchairs, dental care, etc.)			
Other items with value >\$1,000 per year			
Transportation			

5C. Are your answers to question 5B based primarily on records, primarily on your memory, or on both?

*How this data will be used:* For each row in the table, we will calculate Total Benefits = (# of consumers in 5A) x (% of consumers) x (Average Incremental Value per year) x (years of assistance).

# Question 5

Question applies to =>	Consumers that have inquired about Financial Aid/Food/Health/Other Items of Value or Transportation									
Outcome =>	Before receiving ADRC guidance					Within 90 days after receiving ADRC guidance				
	Receiving financial aid	Receiving food or food stamps	Receiving health-related equipment or services	Receiving other items of value >\$1K	Receiving transportation assistance	Receiving financial aid	Receiving food or food stamps	Receiving health-related equipment or services	Receiving other items of value >\$1K	Receiving transportation assistance
What to enter =>	approx-imate \$ value of assistance	approx-imate \$ value of assistance	approx-imate \$ value of assistance	approx-imate \$ value of assistance	approx-imate \$ value of assistance	approx-imate \$ value of assistance	approx-imate \$ value of assistance	approx-imate \$ value of assistance	approx-imate \$ value of assistance	approx-imate \$ value of assistance
consumer 21						\$2,000				
consumer 22		\$500					\$500			
consumer 23								\$1,000		
consumer 24						\$4,000				
consumer 25					\$1,000					\$2,000
<b>Column Totals (# of consumers)</b>	0	1	0	0	1	2	1	1	0	1
<b>Total consumers that the question applies to</b>	5	5	5	5	5	5	5	5	5	5
<b>Column total as a % of consumers that the question applies to</b>	0%	20%	0%	0%	20%	40%	20%	20%	0%	20%
<b>Average \$</b>	\$0	\$500	\$0	\$0	\$1,000	\$3,000	\$500	\$1,000	\$0	\$2,000
<b>Average incremental \$</b>						\$3,000	\$0	\$1,000	\$0	\$1,000

Type of Assistance	Before receiving ADRC guidance (% of consumers from 5A)	Within 90 days after receiving ADRC guidance (% of consumers from 5A)	Average incremental value of assistance per year
Financial aid (e.g., help with paying utility bills, medications, etc.)	0%	40%	\$3,000
Food (including food stamps)	20%	20%	\$0
Health-related equipment & services (wheelchairs, dental care, etc.)	0%	20%	\$1,000
Other items with value >\$1,000 per year	0%	0%	\$0
Transportation	20%	20%	\$1,000

## Question 5

### **Examples of financial aid:**

Utility assistance programs  
Prescription drug copay assistance  
QMB/SMB/SMF  
OHP  
Rental assistance programs  
Clothing  
General Assistance program  
Foreclosure avoidance programs  
OPI (cost of caregiving)  
Veterans Aid and Attendance or other pension programs  
Home modification or home improvement grants  
TANF  
WIC  
Pet Food programs

### **Examples of food programs:**

Food banks/pantries  
Senior Farm Direct Program  
SNAP  
Home-delivered meals  
Food gleaners programs  
Community Gardens  
Holiday meal programs

### **Examples of Health-related equipment/services:**

DME  
Home health services  
Dentures  
Free/low-cost dental services  
Free/low-cost medical services

### **Examples of other items of value over \$1000:**

Legal services

## Question 5

### **Case examples:**

- Per Oregon Access, consumer was approved for QMB effective 1/1/17. **Enter Medicare monthly premium amount x 12.**
- Confirmed that consumer is now enrolled in OPI, getting 15 hours/mo of in-home care. **Enter hourly rate for HCW x 15 x 12.**
- Consumer states that she was approved for SNAP, getting \$16/mo. States she was also awarded the Community Development grant for a wheel chair ramp and grab bars in her bathroom. States she is working with Community Development on logistics to get construction started. **Enter SNAP monthly amount x 12. Also enter Community Development grant award amount.**
- Consumer states that she is having more and more difficulty with preparing meals. Discussed options available to her. Agreed that she would contact the Estacada Senior Center to request home-delivered meals. Her daughter lives close by, so consumer will talk with her daughter about helping with preparing several meals and freezing them throughout the week. **Enter cost/meal from senior center x 7 x 52.**
- Referral made to TRP program for dialysis rides three times/week. **Enter estimated cost/trip x 3 x 52.**

## Question 6

6A. In calendar year 2017, approximately how many consumers have you helped to prevent abuse and neglect issues for themselves (or the family members)?

6B. For financial abuse issues, what is the average approximate value of the abuse prevented per consumer?

Type of Abuse or Neglect	# of consumers (from 6A) receiving ADRC guidance that prevented continued abuse or neglect	Average approximate value of financial abuse prevented
Financial abuse		
All other types of abuse or neglect		n/a

6C. Are your answers to question 6B based primarily on records, primarily on your memory, or on both?

*How this data will be used:* For Financial Abuse, we will calculate Total Benefits = (# of consumers) x (Average Value of Abuse Prevented).

# Question 6

<b>Question applies to =&gt;</b>	Consumers that you have helped to prevent abuse and neglect issues	
<b>Outcome =&gt;</b>	Financial abuse	All other types of abuse and neglect
<b>What to enter =&gt;</b>	approximate \$ value of abuse prevented	X if yes
consumer 26	\$10,000	
consumer 27	\$5,000	
consumer 28		X
consumer 29	\$15,000	X
consumer 30		X
<b>Column Totals (# of consumers)</b>	3	3
<b>Total consumers that the question applies to</b>	5	5
<b>Average \$</b>	\$10,000	n/a

Type of Abuse or Neglect	# of consumers (from 6A) receiving ADRC guidance that prevented continued abuse or neglect	Average approximate value of financial abuse prevented
Financial abuse	3	\$10,000
All other types of abuse or neglect	3	n/a

## Question 6

### ***Case example:***

An Options Counselor was working with an individual who was awarded a significant amount of money from a deceased family member's estate. It was determined that the consumer did not have capacity to manage funds safely, and was at risk for exploitation due to living situation. Referral was made for a conservator - a conservator was put in place to manage the individual's inheritance of \$200k.

### ***How to capture on the worksheet:***

- Enter \$200K under approximate \$ value of abuse prevented.
- Capture referrals made to protective services for any type of abuse (if that data exists).

## Final Thoughts

Enter your responses either in the Survey (Word document) or in the checklist tool

- If you had  $\leq 50$  OC consumers in 2017, then provide data for all of your consumers
- If you had  $> 50$  OC consumers, then provide data for as many as you can (at least 50)

*Questions?*

- Enter them now using the chat function, or:
- Questions related to the survey: [KellyJensen@CompellingReason.com](mailto:KellyJensen@CompellingReason.com)
- Questions related to the caseload report or RTZ/Caretool: [lacey.hanson@multco.us](mailto:lacey.hanson@multco.us)

Send your completed survey or checklist to [KellyJensen@CompellingReason.com](mailto:KellyJensen@CompellingReason.com) by Wednesday, February 28

# Thank you for your cooperation!