

Having the Conversation.....

Choice Advising

We will cover:

- Definitions
- Talking Points
- Process
- Questions and Answers

Defining choice



- Choice means an individual's expression of preference, opportunity for, and active role in decision-making related to the services received including but not limited to case management, service settings, and service providers.
- Be alert to an individual's desire to discuss a possible change in case management, service options, service settings, and providers of service
- Choice may be communicated verbally, through sign language, or by other communication methods.

Defining a Choice Advisor

Initial Choice Advising is typically provided by a Services Coordinator, or someone meeting those qualifications, after a determination of I/DD eligibility. Information must be provided in an impartial manner about the choices of case management delivery, service options and service settings.





Initial Choice Advising

- Initial choice advising means the *impartial* sharing of information about case management delivery, the types of services that are available to the individual based on knowledge of financial eligibility, a functional needs assessment, and service settings available.



Defining Objectivity

- not influenced by personal feelings, interpretations, or prejudice; based on facts; unbiased: *an objective opinion.*

Timeframe

The CDDP will need to determine the timeframes for providing choice advising as long as it is provided prior to or concurrent with the level of care.

For an individual moving into a county with an existing eligibility determination who is not enrolled in support services, choice advising must be provided within 10 days.





If, during the Level of Care assessment, someone requests institutional services over Home and Community Based services, let the family or individual know that a referral to another state would be necessary, if looking for ICF/IDD services. If the person wants Nursing facility placement or hospital services, help them understand that different eligibility standards would apply, and that you could facilitate a referral to the local DSO.

Talking Points when Providing Choice Advising

Tie the importance of the Level of Care to the ability to offer choice to individuals about community options.

Explain that meeting a Level of Care standard, allows federal funds to pay for supports assuring an individual can live and thrive in their community.





Help familiarize with terminology

- ADL (Activities of Daily Living)

means the personal everyday activities requiring assistance including but not limited to:

- eating,
- using the restroom,
- grooming,
- dressing,
- bathing, and
- transferring



More Terminology

IADL (Instrumental activities of daily living). IADL include activities other than ADL required to continue independent living such as:

- meal planning and preparation,
- budgeting,
- shopping for food, clothing, and other essential items,
- performing essential household chores,
- communicating by phone or other media
- Participating in the community



Examples of services available under the **Community First Choice state plan** (aka K) include:

- Non medical transportation
- In-home services
- Respite Care
- Services to support activities of daily living (ADL's)
 - Examples of settings where ADL and IADL services are provided include:
 - Child and adult foster care
 - 24 hour residential services
 - Supported Living
- Instrumental activities of daily living (IADLs)
- Day Supports
- Environmental Modifications





Examples of services available under the **Support Services Waiver** for adults includes



- Waiver Case Management by a Personal Agent
- Individual Supported Employment
- Small Group Supported Employment
- Discovery/Career Exploration
- Employment Path Services
- Family Training
- Environmental Safety Modifications
- Specialized Supplies
- Vehicle Modifications



Examples of services available under the **Comprehensive Waiver** for children and adults includes:

- Waiver case management by a CIIS or Residential/Services Coordinator
- Supported employment
- Small Group Supported Employment
- Discovery/Career Exploration
- Employment Path Services
- Family training



Services available for children with intensive needs, waiving against a nursing home to live in their family home include:

- Waiver case management by a CIIS Services Coordinator
- Family training
- Special diets
- Translation
- Respite for children in nursing facilities

This is as much about having a conversation as it is providing advice. Listening to what is important to someone and where they need supports can frame how you offer your advice.





Explain that your time together is to:

- provide an overall description of Oregon's service delivery system
- Describe what services may be available based on financial eligibility status
- Explore how they may investigate options that are of interest



Signs that support active listening...

Smiles

Eye Contact

Posture

Mirroring

Not being distracted

(remember to pay attention to cultural differences)



Verbal Signs of Attentive or Active Listening

- Positive Reinforcement
- Remembering
- Questioning
- Reflecting
- Clarification
- Summarization

- If a person decides they want to live in a group home, foster home, or supported living, then services would be through the CDDP for now.
- If an adult wants their services to be provided in their home or their family home, or receive only case management services, then either the Brokerage or the CDDP can provide case management



- The individual and perhaps their family or designated representative can take time to weigh options and make a decision on the Medicaid services they are interested in receiving



It is ok to take time to think about which services to pursue. Some might want to tour a residential home, understand who can provide supports in a family home, request more information, interview providers, Services Coordinators or Personal Agents, and seek advice from family and friends.

- The individual and their family member make a decision on the services desired, and confirm those decisions with the Services Coordinator.





The Services Coordinator documents the what services and case management entity the individual/family/guardian desires

- Matching a person's support needs to the available and willing service providers occurs after Choice Advising, as a part of the service planning process.





ORS 427.121

In accordance with ORS 427.121, a services coordinator must present at least three appropriate licensed or certified residential placement setting options, including at least two different types of licensed or certified residential settings, to an adult individual eligible to receive services in a licensed or certified residential setting prior to the initial placement of the adult individual into the licensed or certified residential setting. The services coordinator is not required to present the residential placement setting options if:



ORS 427.121

- The services coordinator demonstrates that three appropriate placement settings or two different types of residential settings are not available within the geographic area where the adult individual wishes to reside;
- The adult individual selects a placement setting option and waives the right to be presented with other residential placement setting options
- The adult individual is at imminent risk to health or safety in the current placement setting

Documentation

In a progress note capture the date of the Choice advising session, what was offered and what was desired by the person.

Indicate whether the person needed time for making a decision and the agreed upon time frame for their decision.

Progress note the decision when it is made

Be certain to get the individuals signature on the LOC form



Periodic checking in.....

Checking in at monitoring visits or other opportunities as to “how are things going” opens the door for further conversation if someone indicates some dissatisfaction or an interest in trying something different.

Be mindful of unintentionally influencing someone, when talking about a change in service option, service setting or service provider.

Sometimes intervention might be needed to resolve a small problem that seems big, and is leading to quick decisions to make a change

Offer options if someone is interested and indicating a desire for a change in case management services, service options, setting or provider



Choice Advising Annually

Choice advising must be provided at least annually, and must include information to the individual, of their right to request access to other available services.

This need not be as formal as the initial choice advising, but you want to ask about satisfaction in services such as: is their plan working; is the living environment working? Do they have opportunities to do new things? Are they interested in talking about other options?

If concerns are noted, start the conversation about what options the person is interested in. If others are involved as a part of the individuals team, ask whether it would be helpful to have a conversation with those people to explore ideas.

Be open and supportive of an individual who is expressing an interest in changing case management options, a service or service setting option or a service provider.

Use your phenomenal skills!

- Practice Active Listening
- Share your knowledge of CDDP & Brokerage services in an objective manner
- Provide neutral guidance
- Be sensitive to cultural differences
- Remember that your nonverbal communication is as important as what you say
- Welcome individuals and families into our services!