PERSONAL CHOICE REFERRAL/INTAKE/ENROLLMENT PROCESS

1. Referral:
—Can come from DHS, Community Agencies, family/friend;
Point of Entry is:
Advisement Agency…

ADVISEMENT AGENCY:

2. First contact with consumer involves providing information re: program. (by an Advisor)

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A. Screen for Appropriateness by Advisement Agency/Advisor
   a. Medicaid eligible/LongTermCare active?
   b. Meets Level of Care for program?
   c. Ability to Self-Direct or Representative available
   d. Willingness to participate in the program.

B. Send participant packet of Program information and list of Approved Providers.

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If referral appears appropriate for PersonalChoice and not currently LTC active, refer to appropriate LTC office to begin Medicaid application process.
Assist with application as needed.

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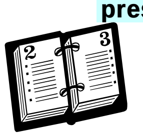
If Referral is not appropriate for Personal Choice, proceed by investigating other community program options.
Personal Choice Enrollment process ends here.

3. Advisor Schedules Appointment for Home Visit
   A. **If participant will be utilizing a Representative ensure they will be present during home visit.**



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4. Contact DHS/Project Coordinator to inform of referral.
   A. Project Coordinator mails Agency Choice Form and info re: each agencies and requests participant choose which agency they want for Advisement and Fiscal Intermediary Services.

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5. Prior to Home Visit-Advisor
   A . Calls participant to confirm receipt of Program Information and List of Approved Providers.
   B .Confirm desire to continue with the process with current agency.

6. During Initial Home Visit with Advisement Agency
   A. Assess participant utilizing PersonalChoice Functional Assessment and PersonalChoice UCAT Supplemental Assessment; also screen for Self-Direction utilizing Self-Direction Assessment.
   B. If Representative is requested, screen potential Representative utilizing Representative Screening Tool and have Participant and Representative sign Designation of Authorized Representative form; and have Representative complete BCI check approval form.
      a. If participant still appears appropriate and interested in program, obtain signature on form CP-12 (DHS Community Services Choice form)
      b. Review Rights and Responsibilities document with Participant and Representative (if applicable) and obtain signatures.
      c. Ensure Participant has completed and submitted LTC application (assist as necessary)

7. After Initial Home Visit—Advisement Agency involvement

- **A. If participant is appropriate, alert other Team members to schedule Equipment/Accessibility and Health Assessments.**
- **B. Create file within Consumer Direction Module/CDM (web-based system) which includes Functional Assessment to be reviewed by DHS PersonalChoice Project Coordinator office for determination of Monthly Budget**
- **C. Fax copy of assessment along with completed Level of Care form(CP-1), and Representative BCI Check form (if applicable) to DHS/Personal Choice Coordinator.**
- **D. Send participant PersonalChoice Guidebook and Individual Service and Spending Plan (ISSP) development materials.**
- **E. Follow up with LTC Office or Participant as needed to ensure Waiver eligibility is in place or pending.** →
- **F. Schedule home visit to begin Participant Training/Budget development. (Schedule minimum two-week window to allow time for other assessments to take place and DHS/CAH to determine Level of Care and Budget amount).**

--If not appropriate for Medicaid, DHS mails denial and appeal process information. Assisted by Advisement Agency with Appeal as needed.

8. DHS/PC Project Coordinator-

- **A. Review New file/functional assessment; approve/deny in CDM.**
- **B. Notification goes to Advisor/participant re: decision and budget.**

9. Second Home Visit-Advisement Agency

- **A. Begin developing Individual Service and Spending Plan (ISSP) utilizing monthly budget amount provided by DHS/CAH.**
- **B. Complete PersonalChoice Participant Goal Summary utilizing goals identified in the Assessment process (use all three assessments-Functional/Eqt./Medical).**
- **C. Ensure participant has reviewed PersonalChoice Training materials by conducting pre-test. (Provide training as needed, schedule additional sessions as needed).**
- **D. Ensure participant has received enrollment packet from Fiscal Intermediary and has also identified potential Personal Assistants.**
- **E. Ensure potential Personal Assistants have begun application process (especially BCI check)**

10. After Second Home Visit-Advisement Agency

- **A. Send completed ISSP and Goal summary to DHS/CAH PersonalChoice Office for approval. (ISSP must be approved by DHS prior to program start)**
- **B. Follow-up with designated Fiscal Intermediary to ensure enrollment process for both Participant and potential Personal Assistants is taking place.**
- **C. Schedule additional home visit to finalize ISSP and/or complete participant training (if needed)**

11. Final Steps prior to Program Start-Fiscal Intermediary

- **A. Confirm receipt of approved ISSP**
- **B. Ensure Participants Personal Assistants are approved and enrolled**
- **C. Set program start date to coincide with payroll pay periods.**
- **D. Inform Advisement Agency, LTC, Participant and DHS of program start date-using web based system.**

Final Steps-Advisement Agency

- **A. Ensure DHS/Participant and Fiscal Agency have approved ISSP**
- **B. Ensure participant training is complete**

ENROLLMENT PLAN

Cash and Counseling/Personal Choice: Year 3

TASKS:

1. ***TRANSITION REMAINING INTERESTED PARI WAIVER RECIPIENTS TO PERSONAL CHOICE WAIVER.***
   - Potentially 78 participants by **1/1/2007**.
   -At present (11/30/06) approximately 92% of those interested consumers have been assessed and are in the enrollment process.
   -Responsibility for this process relies on the Advisement Agency/PARI and DHS.

2. ***MARKETING CAMPAIGN UNDERWAY (10/06-9/30/07)***
   - **Develop Brand and Collateral Materials-** The program will develop a unique logo with the program name with assistance from a marketing firm (Policy Studies,Inc.) that has been contracted to provide this assistance by the Cash and Counseling National Program Office. Collateral materials will then be developed utilizing this logo for distribution to the various identified target groups. Materials will include brochures, fact sheets, one-pagers, success stories, etc.

   - **Conduct Presentations at Conferences, Individual Meetings with Target Groups-** Have meetings with the various target audiences utilizing the presentation templates and collateral materials. The audiences have been prioritized as follows:
   1. DEA management personnel
   2. Case Management supervisors of contracted DEA agencies during regularly scheduled monthly meeting at DEA
   3. Case managers at the six contracted DEA Case Management agencies
   4. Representatives of Elder Advocacy groups (AARP etc.)
   5. Potential participants, advocates and family members at scheduled events (conferences, Senior Expos, etc.) where they gather

   - **Distribute Collateral Materials-** Distribute materials through targeted mailings to potential participants (including recipients of other traditional waiver services), agencies and groups that serve elders, local Senior Centers, etc.; as well as include information in AARP and Senior Center newsletters

   - **Provide Program Information through One Stop information center-** The state developed a one-stop information center for elders and adults with disabilities. Program information will be available for distribution through the Center as well as the center's website, and training of center's information and referral staff.

3. ***Outreach to active participants on Personal Choice (March '06-Oct '07)***
   -Utilizing Consumer Satisfaction Survey and Health and Safety Survey tools, determine ways of improving the quality of the program and increased participation and enrollment.
4. ***Outreach to existing Advisement and Fiscal Intemediary Agencies***
   -to complete site reviews to address quality assurance/improvement and to determine ways of assuring the maximum amount of enrollment activity.