



## **ADRC First Pilot Protocol**

### **1. Intake/Pre-Screening**

SDS Pilot team shall

- a. Educate care coordinators, PCA providers, and other partners about the pilot project;
- b. Provide training to the ADRC Screener on the Alaska First Intake & Pre-Screening Tool and eligibility for PCA and ALI Waiver.
- c. Provide *Alaska ADRC First Intake & Pre-Screening Protocol* tool.
- d. Provide VPN access to DS3 for the ADRC First Screener and Site Managers

Participating Partners shall

- a. Contact the ADRC to notify them when an individual inquires about Medicaid services (PCA or other Long Term Care Services),
- b. Contact the ADRC to conduct a pre-screening in an individual currently receiving services requests information or assistance to meet additional needs (moving from PCA to Waiver, or requesting information about behavioral health, housing or other long term care services)
- c. If an individual has already received a pre-screening, assist them in completing the application for services and submit to SDS.

The ADRC First Screener shall

- a. Screen all ADRC clients using *Alaska ADRC First Intake & Pre-Screening* tool;
- b. Make immediate referral in emergency/crisis situations;
- c. Conduct the pre-screening within three days of initial contact;
- d. Be willing to meet the individual at a location of their choice, in the ADRC office, in their home, or over the phone;
- e. Once the screening is complete, enter the individual's name, DOB, initial outcome, ADRC participant identifier, and date note "ADRC Evaluated" into DS3.
- f. Complete an *ADRC First & Intake Pre-Screening Completion form* for the individual to identify initial outcome(s) including support/service from supported decision making and comprehensive list of providers of those services for un-biased consumer choice.
- g. Provide information to providers if contacted on whether or not a pre-screening has been completed
- h. Provide options counseling to anyone 18 and over,
- i. Refer anyone under 18 to STAR program,

### **2. Access Assistance**

The ADRC First Screener shall evaluate the outcome of the pre-screening and assist individual in making informed choices.

- a. Screening identifies need for assistance with ADL/IADL; not Medicaid eligible.
  - i. ADRC provides options counseling to individuals to include grant or private pay service options.
- b. Screening identifies need for assistance with ADL/IADL; and is Medicaid eligible.
  - i. ADRC Screening checks for Medicaid eligibility.

- ii. ADRC provided options counseling and supported decision making.
  - iii. ADRC assists individual in contacting selected provider(s).
- c. Screening identifies individual may meet NFLOC;
  - i. ADRC Screener checks for Medicaid eligibility.
  - ii. ADRC provides options counseling supported decision making.
  - iii. ADRC assists individual in contacting selected provider(s).
- d. Individual screens positive for Mental Health or Substance Abuse issues;
  - i. ADRC screener provides options counseling and supported decision making.
  - ii. ADRC screener assists individuals in contacting a provider(s).
- e. Individual does not identify need with ADL/IADL. May or may not be Medicaid Eligible.
  - i. ADRC provides options counseling and supported decision making to promote independence in the community.
- f. ADRC Screener will provide options counseling and provide information or assistance regarding Medicare, Social Security, Alaska Public Assistance, Miller's Trust, housing, employment, benefits counseling and guardianship.

Participating providers shall

- a. Maintain communication with the ADRC screener and assist the individual in completing and submitting the application for service as needed.

### **3. Medicaid Waiver or PCA Intake for Individuals Referred through Screening**

SDS Office Assistant shall:

- a. Review the application
- b. Check to see if client resides in Cooper Landing, Kasilof, Kenai, Nikiski, Ninilchik, Soldotna, or Sterling.
- c. Check DS3 for presence of ADRC Screening participant identifier.
- d. If no ADRC Screening participant identifier, contact consumer, provider, and ADRC First pilot project screener by letter to notify them of the pilot project requirement. The letter will provide the ADRC First pilot project contact information. Letter will be sent via DSM to provider and ADRC First pilot screener.
- e. Enter a Date Note in DS3 "ADRC Letter Sent – Screening Needed," with comments to include which provider submitted the application.
- f. Proceed with regular intake process once all requirements are met.

SDS Assessors shall:

- a. Conduct the assessment

Participating providers shall:

- a. Resubmit application after ADRC screening completed if submittal occurred before the ADRC First Pre-Screening took place.

#### **4. Individual is Denied Medicaid Services**

SDS Assessors shall:

- a. Notify the ADRC, Care Coordinator, and individual if LOC is not met.

Participating Providers shall:

- a. Contact the ADRC to notify them that an individual, who received the screening, was denied for PCA or Waiver services.
- b. Assist the individual in contacting the ADRC.

ADRC Screener shall:

- a. Coordinate with the participating provider to provide options counseling for the individual to assist with accessing other services.
- b. Make a note in the DS3 that this individual was assessed and denied for Medicaid services.
- c. Provide follow up and options counseling as required.

#### **5. Follow-Up**

The ADRC Screener shall:

- a. Contact all individuals who received Options Counseling as soon as situation requires, but minimally, within 2 weeks of initial contact.
- b. Enter date note for "ADRC Two Week Specialist Follow-up", and status in DS3.
- c. Conduct follow-up and provide assistance as necessary.
- d. Enter date notes and status in DS3 of all "ADRC Additional Follow-up" contacts and notes.

#### **6. Evaluation:**

Success of the ADRC First Screening Pilot project will be evaluated using specific performance measures. Data gathering sources will be collected through Survey Monkey, MiCIL, DS3, and participant surveys. There will be two participant surveys conducted during the project. A consumer satisfaction survey will be conducted within one week of initial contact with the ADRC by an ADRC third party; and a three-month consumer outcome interview will be conducted by A third party.

- a. ADRC First Customer Satisfaction Survey
  - i. Conducted within one week of initial contact
  - ii. Conducted by: ADRC Grantee – 3<sup>rd</sup> party
  - iii. Enter date note for "ADRC Satisfaction Contact" in DS3

Performance Measures:

- Number/% of participants who report satisfaction with the ADRC experience.
- % of participants who report their needs are being met.
- % of participants who access LTS services (identify what services)
- % of participants who access substance abuse services.
- % of participants who access mental health services.

- b. ADRC First Three Month Interview

- i. Time frame: Conducted three months from initial contact with ADRC
- ii. Conducted by: Third Party
- iii. Enter date note for “Three Month Consumer Outcome Contact” in DS3.

Performance Measure:

- Percent of participants who accessed services including which services were accessed.
- Percent of participants who remain in their home and/or community three months after being linked to services through the ADRC.

The SDS ADRC Program Manager shall

- a. Assist the RAU and ADRC First Screener in collecting and reporting service data
- b. Evaluate data and provide quarterly reports for ADRC Pilot Team, Director, Commissioner and other Stakeholder groups.
- c. Make recommendations for modifications to pilot program as necessary.
- d. Contact Pilot participants and administer Pilot Project Evaluation.

The ADRC First Screener shall

- a. Keep electronic records of encounters with screening clients;
- b. Track specific outcomes for each screening client.

Third Party

- a. UAA Center for Human Development will conduct the “Customer Satisfaction Survey” and the “Three Month Consumer Outcome Contact.”

SDS RAU shall

- a. Collect data needed for performance measures
- b. Analyze data for desired outcomes
- c. Develop graphic report of outcomes