

## **March 21, 2023 Meeting Discussion Guide for HCBS-COI Advisory Members**

We hope you will come prepared to talk about case management and HCBS functions and activities!

To prepare for the discussions in the meeting, we are asking you to think about the following:

1. **Creative thinking:** If you had to describe the difference between the role of the case manager and role of the direct HCBS provider to someone who knows nothing about services, can you think of an analogy (a comparison or idea that might have a similar relationship)?

For example:

- a. A case manager is like a google map or the waze app that helps you search and navigate, while the HCBS provider is the driver of the car who gets you where you want to go.
- b. A case manager is like a server in the restaurant who helps you find a table you want, offers the menu, answers your questions, and checks with you to make sure your meal is what you wanted and needed – while the HCBS provider is the chef who fixes your favorite meal just as you like it, makes sure to avoid the foods you are allergic to, and adds the bit of sweetness or spice to your day.

**We are hoping you will bring your own analogy, comparing the important activities of case management to the important activities of HCBS direct services, to share with the group. Have fun with this!**

2. **Roles & functions discussion:** We are going to work together as a group to make a list of activities/tasks of the four major functions of the case management process:
  - Needs Assessment
  - Person-Centered Planning
  - Referral and Linking
  - Service Monitoring

To prepare for this discussion, we hope each Advisory Committee Member will:

- a. Think about at least one activity (a task or step) that is important in the four functions. (See following for a few examples.) This can include both activities and tasks that are occurring now and/or where there may be gaps.
- b. For each activity you list, identify who does that now.
- c. Are there things that are working well or things that need to be improved? Who do you think *should* be doing that activity or task? Is there conflict of interest? How can conflict of interest be avoided?

**Please come ready to share your thoughts with the group. We will be using an interactive WhiteBoard on Zoom during the discussion. It may be helpful to have your notes ready for this. And, please note these do not need to be your own examples with personal details; remember the meeting is public and recorded.**

Examples:

*Needs Assessment:* My service provider knows my needs better than nearly anyone because she has helped me for many years. With my permission, she shares important details with my case manager to help make sure my annual needs assessment is as accurate as possible. My case manager uses information contributed by my service provider to improve my service plan. It is clear that these changes are in my best interest, no one else's.

*Person-Centered Planning:* I am currently looking for some new services to help me with tasks around the house because of some recent health-related issues. Based on my request, my case manager called a meeting that included my provider team as well as my sister, to discuss options that may meet my needs. My providers brought forward some creative ideas that could be helpful. However, my sister felt like I really didn't need these extra supports, and that I should be able to get along without any changes. My case manager really helped me navigate these differing opinions. She helped strategize and plan what supports I needed and how to get them in place.

*Referral and linking:* I need to find services to move out of my family's house. My case manager has not offered me good provider options, even though this is my goal in my person-centered plan. I also know my current HCBS provider does not want me to move. She works for the same organization as my case

manager. I don't know who my case manager is listening to the most, and I am not sure where to go for help. A separate case manager working for someone else might help avoid this conflict.

*Service Monitoring/Ongoing Coordination:* I have a lot of appointments with therapists, counselors and different members of my team. My service coordinator helps me schedule and keep all of these appointments straight, sometimes even giving me rides or helping to make sure I get to appointments and meetings. She also makes sure that all of my team is informed about important issues and changes. I am not sure if there is any conflict, but I am grateful that she helps me out a lot.

## **Examples of case management activities/tasks organized by function:**

### Assessment of Needs

- Formal standardized assessment of needs (eg, ILA or SIS-A)
- Informal needs assessment
- Gather paperwork and documents from doctors, schools, others

### Person-Centered Planning

- Explore and discover options for different supports, services and resources
- Helps include people who are important in the planning process
- Develops a plan and strategies to meet goals

### Referral and Linking to Resources

- Provides different options for services and supports
- Helps with resources that are not funded by the plan
- Offers new ideas, options, resources and innovative services

### Service Monitoring/Ongoing Coordination

- Checks in to make sure services and supports are working
- Helps when there is a problem with services or supports
- Offers information about where to file a complaint about services
- Keeps track of any changes to health or safety needs