

Case Management 101 for Supervisors

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Georgia Department of Human Services

Vision, Mission and Core Values

Vision

Stronger Families for a Stronger Georgia.

Mission

Strengthen Georgia by providing Individuals and Families access to services that promote self-sufficiency, independence, and protect Georgia's vulnerable children and adults.

Core Values

- **Provide access to resources that offer support and empower Georgians and their families.**
- **Deliver services professionally and treat all clients with dignity and respect. Manage business operations effectively and efficiently by aligning resources across the agency.**
- **Promote accountability, transparency and quality in all services we deliver and programs we administer.**
- **Develop our employees at all levels of the agency.**

Taxonomy

“Assistance either in the form of access or care coordination in circumstances where the older person or caregiver is: experiencing diminished functioning capacities, personal conditions or other characteristics which require the provision of services by a formal service provider and/or family caregivers.”

-NAPIS_5_2010

Taxonomy

Activities of case management include such practices as:

- Assessing needs
- Developing care plans
- Authorizing and coordinating services among providers
- Providing follow-up and reassessment

-NAPIS_5_2010

Taxonomy

1 unit = 1 hour

Can be prorated into 15 minute increments

15 minutes = .25 units

30 minutes = .5 units

45 minutes = .75 units

Allowable Funds Sources

Program: HCBS Caregiver

- ADRC Expansion Grant
- ADRC State
- CBS – HCBS State
- OAA Title III-B
- OAA Title III-E
- Other
- SSBG - HCBS

Allowable Funds Sources

Program: HCBS Service

- ADRC Expansion Grant
- ADRC State
- CBS – HCBS State
- OAA Title III-B
- OAA Title III-E
- Other
- SSBG - HCBS

Area Plan

- Current cycle: 2012-2016
- Extended 1 year
- Major Sections:
 - Executive Summary
 - Context
 - Service Delivery Plan
 - Allocation, Budget & Units Plan
 - Area Plan Goals

Area Plan Goal

GOAL 2: Administration on Aging – Enable seniors to remain in their own homes with high quality of life for as long as possible through its provision of home and community-based services, including supports for family caregivers.

Name of Service or Program: [HCBS Case Management Services](#)

Goal #2 – Objective #6	Annual Performance Measure	Action Steps	Annual Update on Objective
SFY 2012	SFY 2012	SFY 2012	SFY 2012

Goal – to be reached by SFY 2016

APM – incremental milestones to measure progress

Action Steps – activities to reach APM

Annual Update

Budget Service Summary by AAA

HCBS Service	HCBS-Case Management-Ind	OAA Title III B - Supportive Services	\$67,833	\$3,989	\$7,979	\$79,801
		Service Total	\$67,833	\$3,989	\$7,979	\$79,801
HCBS Community		OAA Title III D - Health Promotion	\$27,782	\$1,634	\$3,269	\$32,685

Lists funds sources

Lists federal, state, local match funds

Lists grand total for service

Provider Service Detail

Program: HCBS Service

Service	Fund Sources Authorized	Fund Source Revenue	% of Service Revenue	# of Est. Persons	Unit Cost	# of Units	Units x Cost	Average Cost per Client	Average Cost per Unit
HCBS-Case Management-Ind									
	OAA Title III B - Supportive Services	\$79,801	1.00%	96	\$0.00	300.00	\$0.00	\$831.26	\$266.00
Totals for HCBS-Case Management-Ind:		\$79,801		96		300.00	\$0.00	\$831.26	\$266.00

- Funds Source Revenues
- # of estimated persons
- # of units
- Average cost per client
- Average cost per unit

HCBS Policy

MAN 5300, CH 210

Revisions under way:

- Review Team
- Stakeholder Review
- Management Approval

Case Management Review

AIMS Reports to help:

- Services Analysis Report
 - # units used
 - Assessment date
 - DON-R Scores for LOI and Unmet Needs (ADLs and IADLs)
 - Whether on Waiting List

Case Management Review

AIMS Reports to help:

- Financial Reimbursement Report by Service
 - Expenses for month and SFYTD
- Program Performance Report
 - Counts persons and units compared to Area Plan

Client Record Review

- Assessments:
 - DON-R: accuracy, frequency, comments
 - NSI, Food Security: integrity with DON-R
 - Specialized assessments: accuracy
- Program Status:
 - Mix of services
 - Duration of services
 - Appropriate based on assessments

Client Record Review

- Waiting List Status
 - Length of time on WL
 - Mix of services compared to active services
 - Appropriateness based on assessments

Client Record Review

- Case Notes
 - Thorough, professional, accurate
 - Demonstrate timely and appropriate follow-up
 - From assessment
 - From previous case notes
 - Minimize duplication of other services/providers
 - Demonstrate competence in key functions of case management