

BALANCING INCENTIVE PAYMENT PROGRAM

STAKEHOLDERS MEETING

September 5, 2012
Harry S. Truman State Office Building
Conference Room 400
Jefferson City, MO 65101

Balancing Incentive Payment (BIP)

PURPOSE:

Transform States long-term care systems by:

- **Lowering costs through improved systems performance & efficiency**
- **Creating tools to help consumers with care planning & assessment**
- **Improving quality measurement & oversight**

Balancing Incentive Payment (BIP)

- **Increased Federal Matching Funds**
 - *States that spent 25-50% on non-institutionally-based Long Term Services and Supports (LTSS) are eligible for a 2% enhanced FMAP.*
 - *Required to reach 50% of total LTSS expenditures on non-institutionally based LTSS by September 30, 2015.*
- **No Funding for Structural Changes**

Balancing Incentive Payment (BIP)

- **Application submitted March 2012**

Copy of application can be found at:

<http://www.medicaid.gov/Medicaid-CHIP-Program-Information/By-Topics/Long-Term-Services-and-Support/Balancing/Downloads/Missouri-APP.pdf>

- **Approval Period**

July 1, 2012 – September 30, 2015

- **Total Award**

\$100.89 Million

Balancing Incentive Payment (BIP)

DELIVERABLES:

- **Work Plan submission by September 28, 2012**
- **Structural Changes in place by September 30, 2015**
- **Quarterly reporting on status of work plan deliverables**
- **Final Report due December 31, 2015**

BIP Work Plan Deliverables

- **Standardized Information**
- **Coordinated Case Management**
- **No Wrong Door/Single Entry Point**
- **Website**
- **Toll Free Number**
- **Advertising**
- **Core Standardized Assessment/Core Data Set**
- **Conflict Free Case Management**
- **Data Collection & Reporting**
- **Sustainability**
- **Exchange IT Coordination**

BIP Work Plan Deliverables

- **STANDARDIZED INFORMATION**
 - Same information regardless of access point
- **COORDINATED CASE MANAGEMENT**
 - Design a coordinated system that guides the individual through both a functional and financial eligibility determination process.

BIP Work Plan Deliverables

- **NO WRONG DOOR/SINGLE ENTRY POINT**

- **Access points where individuals can inquire about:**

- *Community long term services and supports*
- *All available services regardless of funding source*
- *Medicaid eligibility criteria*
- *Enrollment assistance*

- **Oversight Agency:**

Department of Social Services

- **Operating Agencies:**

Department of Health & Senior Services

Department of Mental Health

BIP Work Plan Deliverables

- **WEBSITE**

- Informative website containing information on community LTSS available in Missouri

- **TOLL FREE NUMBER**

- Provides information on community LTSS options

- **ADVERTISING**

- Establish as the “Go To” system for community long term services and supports

BIP Work Plan Deliverables

- **CORE STANDARDIZED ASSESSMENT (CSA)**

- **Supports the purposes of:**

- **Determining eligibility,**
- **Identifying support needs, and**
- **Informing service planning,**

- **Standardized Initial Assessment**

Level I

- **Comprehensive Functional Assessment**

Level II

BIP Work Plan Deliverables

- **CORE DATA SET for LEVEL II ASSESSMENT**

- **Activities of Daily Living**

Eating

Bathing

Dressing

Hygiene

Toileting

Mobility

Positioning

Transferring

Communicating

- **Instrumental Activities of Daily Living**

Preparing Meals

Shopping

Transportation

Housework

Managing Money

Telephone Use

Managing Medications

Employment

BIP Work Plan Deliverables

CORE DATA SET (continued)

- **Medical Conditions/Diagnoses**
- **Cognitive Function & Memory/Learning**
- **Behavior Concerns**

BIP Work Plan Deliverables

- **Conflict Free Case Management**

- **“Conflict of Interest” - a “real or seeming incompatibility between one’s private interests and one’s public or fiduciary duties.”***
- **Situations where the agent that conducts the functional assessment and/or case management also provides services to that individual.**

*Black’s Law Dictionary, Eighth Ed., Thomson West, St Paul, MN (2004)

BIP Work Plan Deliverables

Conflict Free Case Management (continued)

- **State Requirements**
 - Establish conflict of interest standards for the Level I screen and Level II assessment and care planning
 - States must ensure the enrollment of any qualified and willing provider
 - An individual's plan of care must
 - Be created independently from the availability of funding to provide services
 - Offer all community LTSS covered by the State that the individual qualifies for and is identified in the assessment
 - Referral for community LTSS cannot be made if the referring entity has a financial relationship with the provider of services

BIP Work Plan Deliverables

Conflict Free Case Management (continued)

- **Mitigate conflicts of interest by establishing an independent agent that cannot be any of the following:**
 - *Related by blood or marriage to the individual*
 - *Any paid caregiver of the individual*
 - *Financially responsible for or empowered to make financial or health-related decisions for the individual*
 - *Influenced by State or local funding*
 - *Providers of LTSS for the individual, or those who have interest in or are employed by a provider of LTSS.*

BIP Work Plan Deliverables

Conflict Free Case Management (continued)

- *At the option of the State, exception may be made to providers being given responsibility to perform assessments and plans of care if:*
 - *Provider is the only willing and qualified provider in a geographic area*

AND

- *The State devises conflict of interest protections, such as “firewall” policies.*



BIP Work Plan Deliverables

- **DATA COLLECTION & REPORTING**
 - **Service Data**
 - **Outcome Data**
 - **Quality measures**

BIP Work Plan Deliverables

- **Sustainability**
 - Identify funding sources to build and maintain the required structural changes
 - How structural changes will continue to be funded beyond the grant period
- **Exchange IT Coordination**
 - States must make an effort to coordinate their NWD/SEP system with the Health Information Exchange IT system.

Discussion

- **Stakeholder Recommendations**
- **Stakeholder Assistance**



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Additional Information:

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