



**CABINET FOR HEALTH AND FAMILY SERVICES
DEPARTMENT FOR MEDICAID SERVICES**

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**Department for Medicaid Services (DMS) Participant-Directed Services (PDS) Advisory
Subpanel**

May 28, 2019, 1:00pm-3:00pm

Meeting Summary

Meeting: Participant-Directed Services (PDS) Advisory Subpanel – Meeting #3

Date: May 28, 2019

Location: James Thompson Conference Room, CHR Building, 275 East Main Street, Frankfort
KY 40601

AGENDA TOPICS AND KEY DISCUSSION POINTS

I. Objectives and Recap

- a. DMS discussed agenda and objectives.
- b. DMS recapped the previous subpanel meeting in March.
- c. Panelists voiced concerns over number of subpanel members actively attending the panel meetings. Panelists in attendance raised concerns as to the number and mix (participants, family members, or providers) of subpanel members. DMS is actively working to ensure that an adequate number of PDS participants or family members are involved.
- d. Panelists voiced concerns over terminology/jargon. DMS reminded panelists to raise questions any time there is a lack of understanding; additionally, DMS will be intentional about avoiding use of jargon without explanation.

II. PDS Self-Assessment Tool

- a. DMS provided an overview of the tool. The purpose of the Self-Assessment tool is to inform participants (and their natural supports) and identify the skills, knowledge, and abilities to be successful PDS employers.
- b. Panelists reviewed the draft Self-Assessment Tool independently.

- c. Panelists agreed that the tool is useful for skill-building and helps inform participants of the expected responsibilities.
- d. Panelists offered the following opportunities for improvement for DMS's consideration:
 - i. Clarify where the PDS representative's name goes
 - ii. Use consistent terminology throughout all PDS documentation
 - iii. Clarify intent of tool and use welcoming, collaborative language
 - iv. Add to Recruiting section – find employees by engaging with community (e.g., familiarity with organizations that work with people with disabilities, advocacy groups, etc.)
 - v. Clarify responsibility for all costs associated with PDS (either in this tool or elsewhere)
 - vi. May want to use larger font size for individuals with visual impairments and/or make the tool digitally accessible
 - vii. Re-visit the Participant/Representative Response options to include an option which indicates needing assistance rather than having someone else do the task
 - viii. Could add a summary/next steps section at the end of the tool to make the tool actionable (however, this information may already be in the care plan)
- e. Panelists offered the following implementation comments and questions, which DMS will need to consider moving forward:
 - i. Length of tool may be intimidating, especially if participant completes on their own
 - ii. Potentially pilot the tool to a small group of people
 - iii. Introduce the tool through a training/webinar
- f. Unrelated suggestions:
 - i. Some case management agencies maintain lists of potential PDS employees. Some panelists suggested the database be expanded for use statewide.
- g. Implementation approach:
 - i. Panelists agreed with the proposed approach of introducing the tool early on, prior to selection of a case manager/participant-directed case manager (CM/PDCM), and then having participants complete the tool during the CM/PDCM's first home visit following CM/PDCM selection.
- h. Name of Tool
 - i. Panelists agreed that the tool should be renamed to avoid the term "assessment." Several panelists favored the name "PDS Employer Responsibilities Review Tool."

III. PDS Criteria for Legally Responsible Individuals (LRI)

- a. DMS reviewed the legally responsible individual policy from the amended 1915(c) HCBS waivers.
- b. Panelists offered the following suggestions for clarifying and educating the public on the new policy:
 - i. Clarify that power of attorney does not meet the LRI definition
 - ii. Clarify who can be an employee, outside of LRI
 - iii. Clarify what documentation or justification would be used for each criteria
 - iv. Could include a one pager in the welcome packet
 - v. Consider visual presentation of information and separate information by minor child and adult for each reference
- c. Panelists also raised several implementation questions for DMS consideration.

IV. Next Steps

- a. The next subpanel meeting date will be on July 23, 2019.