

The Partnership for Community Integration

Help for Iowans who want more independence and choice





Before you start reading this booklet, here's something you should know that will make it easier to understand. The booklet has many terms and program names which are explained in the glossary section beginning on page 13. These terms and names are in **bold**faced type in the booklet.

Introduction

You may already know something about The Partnership for Community Integration program. This program is also called Money Follows the Person (MFP). That's what we'll call it throughout this booklet.

MFP is a program that helps lowa residents in Qualifying Facilities to move into their own home or apartment in the community of their choice.

Qualifying Facilities include:

- Intermediate Care Facility for Intellectual Disabilities (ICF/ID)
- Nursing Facility
- Psychiatric Medical Institutions for Children (PMIC)
- Inpatient hospital setting

Right now, you live in an ICF/ID, nursing facility, PMIC, and inpatient hospital setting. Or, maybe you are a family member, friend or legal representative of someone who does. And perhaps you are ready to take advantage of the choice MFP offers—of living more independently out in the community instead of at the ICF/ID, nursing facility, PMIC, or hospital.



MFP, which is funded by dollars from the U.S. government and the State of Iowa, is run by Iowa Medicaid with the help of many partners.

Facility and Community Providers all helped design this program. Now they watch to see how well it works for the people taking part. That way, they can keep improving the program.

You or your family member are part of an option that offers people more choices, more independence, and the services they need to be successful in their own home or apartment —in the community of their choice.

This booklet is for you if...

- You are living in a Qualifying Facility (ICF/ID, nursing facility, PMIC, and inpatient hospitalization) and wanting to move to a house or apartment.
- ▶ OR you are the family member, guardian or legal representative of a resident in a Qualifying Facility listed above who is planning to move.
- ▶ OR you have been chosen by a Qualifying Facility resident to serve as their Independent Support Broker under the Consumer Choices Option (CCO).
- ▶ OR you are a member of the participant's Transition Planning **Team**, or want to support a friend or relative participating in MFP, and you are interested in supporting their full participation in the community.

The handbook that you are reading now provides information about the choices you can make: where to live, with whom, how to pay the rent, the services you want to use, and how you spend your time.

If you are involved in planning the move for yourself or someone else, you may have received the brochure called The Partnership for Community Integration. It contains important information about consumer rights and responsibilities under MFP. Additionally, it talks about the risks that people take on when they live more independently. A Transition Specialist can answer your questions and help you think taking advantage of all the new opportunities vou have.

MFP participants who want the greatest flexibility in choosing their services, and want to have responsibility for managing them, can explore the Consumer Choices Option. All participants will receive the help of an Independent Support Broker and a Financial Management Services provider to carry out new responsibilities.

More information is available from your **Transition Specialist** and from the booklet called Medicaid Home- and Community-Based Services (HCBS) Consumer Choices Option (CCO): Customizing Services for lowans with Disabilities and Older Iowans. You can get a free copy of that booklet online at: https://hhs.iowa.gov/ime/members/ medicaid-a-to-z/consumer-choices-option

Just click on the "Medicaid Home and Community-Based Services CCO Brochure."

Your Decision to Move and What it Means to You

The decision to move out of a Qualifying Facility and into a house or apartment is a big one. It's the first step in building a new life for yourself. The supports and services you need in your daily activities, for staying healthy, and for work and recreation, will still be there—but now you will choose who provides them.

You will choose the community where you live (if you haven't already), and the house or apartment that will be your home. Your Transition Specialist and your planning team or Interdisciplinary Team (IDT) will discuss with you whether you want to have roommates. If you do, your team can probably help you find them. You and your team will talk about how you want to spend your time during the day—at a job or doing something as a volunteer.

This is a time for you to think about how you want to live your life. You'll want to talk that over with your family, friends, and other people you trust. Under the Money Follows the Person (MFP) program, the person who is in control of these decisions is you. Tell your planning team what you like—and what you don't like. If you are not happy about something, say so. You are encouraged to think about trying new things, and remember to ask for help if you need it.

Being more independent also means that you will be taking responsibility for your decisions.

We'll talk about this in Chapter 9.



This booklet also describes the extra services for people who decide to move out of the facilities. For example, you will have help with moving expenses with setting up a household with making your home accessible. You may be able to "try out" your new place in an overnight stay. There are funding caps on these kinds of services—but you or your family can pay for more of them if you choose.

It is important for you to work closely with your Transition Specialist and your planning team to think about everything you will need—to make sure it is planned for, and that there is enough money available to pay for it.

Medicaid does not pay for room and board once you move to your own place. You will be responsible for paying rent along with buying groceries and household supplies.

How much you can afford to pay will affect the type of housing you choose. You'll read all about this in Chapter 6.

You also may want to have more control over your budget for some of your services. This is called "self-direction," and you can read about that in Chapter 5. Consumer Choices Option.

Your Support Team

Okay, now you are ready to put together the support team that will help you plan your transition to a new place in a new community. Your **Transition Specialist** can give you good ideas, but it's up to you to decide who is on your team.

Your team will probably include:

- Family, friends, and any people you trust.
- People from the facility who know you well.
- ▶ Your Transition Specialist.
- Your Independent Support Broker, if you are going to participate in the Community Choices Option (CCO).

Your **Transition Specialist** knows the community where you want to move, and will help you get to know service providers there. You are the one who decides who will be providing services to you, and you can talk this over with your team and the **Transition Specialist**. It might be a good idea to have one or more of those service providers on your planning team.

If you will be getting **Supported Community Living** services, it might be especially important to have that provider on your team too. They will be responsible for making sure you have the personal supports you need in your new home. That might even include having a support person live at your place with you!



Remember, it is your choice who you pick for your planning team. As you get new ideas, you can invite additional members to join your team. But think about this, it might be hard to plan and run meetings if your group gets too big.

If you decide that you no longer want someone on your team, say so. That is also your choice.

The Planning **Process**

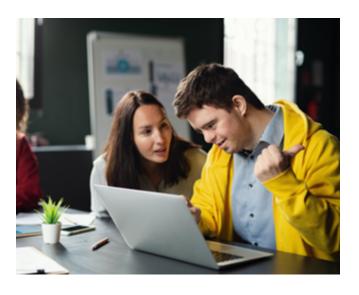
You and your team will develop a Transition Plan that covers everything you need in order to be safe and healthy and to live your life the way you have planned.

Your plan includes supports and services related to

- daily living
- medical and dental services
- the supports you need for employment or volunteer activities
- transportation
- social and religious activities of your choice
- mental health and emergency services

The facility staff will provide your planning team with the records related to your health and to the services you have used there. Since you will be living in your own home, there may be things that your facility currently provides for you. Here are some examples:

The facility staff will provide your planning team with the records related to your health and to the services you have used there. But since you will be living in your own place, there may be things you will need that you take for granted right now at the facility.



Here are some examples:

Do you use a wheelchair? How big is it? How does that affect your housing needs?

Do you have a sensory disability (vision or hearing)? What kind of supports or accommodations will you require?

Do you need to be able to get to medical **specialists?** Do you take medications? Can your team help plan your transition so you have what you need at all times?

Will you need transportation in order to work or do other outside activities? What kind of transportation?

Do you need personal assistance available on a 24-hour basis? If you can manage by yourself much of the time, what do you need in order to get help immediately if you need it?

When you get upset, do you need people there right away to help you calm down and get things under control?

What will you need in order to enjoy your **new situation** and keep from being lonely?

Your Transition Specialist and your planning team will help you imagine everything you might need to be happy. You can also look at the Transition Planning Guidebook (https:// hhs.iowa.gov/sites/default/files/Transition%20 Guidebook Web.C.pdf) developed by the MFP team to help you think about some different things to plan for.

Choosing Services

Once you and your team have listed all your needs, you will start choosing services to meet those needs. Some services will have to be there right away when you move in, while others will be there within 60 days. Your Transition Plan will tell you which is which.

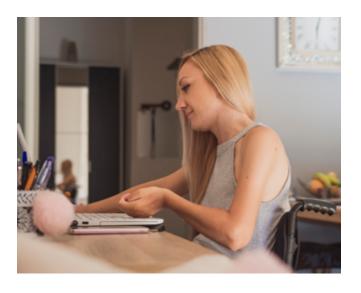
Under **MFP**, it is expected that participants will need extra services and supports to make the move from the facility, get settled in their own place, and get used to their new living situation. It's expected you won't need these services and supports for longer than one year.

Your first year in your own place is called your **Demonstration Year**; it starts on the day you move out of a facility and ends exactly one year later. The extra services that you may need in the first year are called **Demonstration** Services and Supplemental Services.

Examples of **Demonstration and Supplemental Services** are found in the chart in Appendix A toward the end of this booklet. Several of the **Demonstration Services** are intended to make sure there's a smooth transition from the facility to community living. Under **MFP**, the facility staff and community providers can work together to make sure your support team are ready to provide you with the services you need.

This can include training of provider staff. Funding is also available to make sure your new home or apartment is accessible and meets your needs.

There are some services that you expect to need for a long time—maybe even for your whole life. Many people with disabilities have been living successfully in the community



because they can get these services thanks to money from the state of Iowa. These services will be available both during your **Demonstration Year** and after for as long as you need them.

The **lowa Department of Health and Human** Services (HHS) is working with the lowar Legislature to try to add some mental health services to the program that can help people who are participating in MFP.

It is not certain that the services will be added. Your team will work on finding ways to make sure you get everything you need in case the services are not added. Within the MFP program, you have access to a Behavioral Support Specialist who can assist with planning for your needs. You can ask your Transition Specialist for a brochure to learn more.

Your **Transition Specialist** can help you review information about provider agencies where you want to move. Providers often have websites: you can find lists of provider on the Iowa COMPASS website. (https://iowacompass.org/)

You can also choose the staff people who will be living with you or providing your services. At the end of your Demonstration Year, you will be assigned a Community-Based Case Manager who will take over from the Transition Specialist.

Note: There are some things that MFP cannot pay for, but they might be paid for by other programs.

The Consumer **Choices Option**

The Consumer Choices Option (CCO) is for people who want more control over a part of the budget for their services and supports.

Typically, **Medicaid** members with disabilities pick from among certified "Medicaid providers" for their services. Iowans in MFP who use the **CCO** can *hire their own employees* for some things, and they can plan and use their funds to get things that are important to them. This is why the **CCO** is called "self-direction."

Your **Transition Specialist** and your planning team can help you decide whether the CCO is right for you.

People who use self-direction have three tools to help them make decisions and build the life they want.

- 1. First, they have an individual budget that can (if the person chooses) cover their personal care needs, the supports to help them live and work in the community, and goods and services they need, but might not be able to get under regular Medicaid.
- Second, an Independent Support Broker (ISB) provides information to the individual taking part in MFP—and helps them develop their budget. The ISB also helps them get the supports they need, and makes sure the plan and budget are working well. You choose your ISB.



3. Third, a Financial Management Service (FMS)—a bank or credit union—keeps the money from your budget in a special account, and pays for what you purchase, in line with your individual service plan and budget. The **FMS** works for you and makes sure that federal and state laws, such as payroll taxes, are followed.

It is your choice whether to use the **CCO** when you move out of the Qualifying Facility. If you decide you want to stop using it, you can stop at any time, and your Transition Specialist or **Community-Based Case Manager** will help you switch to the usual way of planning for your services.

If you want to learn more about self-direction, your Transition Specialist can give you and your family the information you need. You can also find more at:

https://hhs.iowa.gov/programs/welcome-iowamedicaid/member-services/cco.

Finding the Right Place to Live

By this time, you've made an important discovery: There's a lot to think about as you choose a place to live. Do you want to live with roommates? Do you need a support worker 24 hours a day? If the answers are yes, you will need a bigger house or apartment than if you lived alone.

MFP has some important rules about where participants can live. The rules help make sure people have dignity, privacy, and as much independence as possible.

The three kinds of Qualified Residences

- 1. A home that you or a family member owns or leases;
- 2. An apartment that you lease, as an individual—with lockable doors, and with living, sleeping, bathing, and cooking areas for you to use as you wish;
- 3. A community-based home in which no more than four unrelated people live.

There are many ways to go about finding a place you like and that you can afford. You and your family can look around in the community where you want to move. Your Transition Specialist may have ideas, or you can check the lowa Finance Authority website (www.iowafinance.com) to help.



If you are going to need Supported Community Living (SCL) services, the SCL provider may already have some places for you to look at. The important thing is that you must have the right to choose; the final decision is up to you.

MFP funds can be used to pay for an apartment's security deposit, as well as other one-time expenses such as cleaning, and hooking up the telephone and utilities. You have not had to pay for rent, food, heat or electricity while living in the Qualifying Facility, but if you move into a home or an apartment, you will probably have to figure out how to afford all of this. It will help having roommates to share the costs. You and your future roommates need to agree on how you will share the rent, cost for groceries, the heat, electricity, and water bills.

The Services Chart in Appendix A shows that you can get your new home fixed up to be accessible. For example, if you use a wheelchair, you might need a ramp or a wider bathroom doorway.

Soon it will be time for you to move to your new place. But first, you and your planning team might want to talk about whether it would be a good idea to stay there overnight to try it out. That way, you can make sure you (and your roommates) will be comfortable there. You might see some things that need to be changed. If you like it there, you will feel very good when moving day comes.

The Countdown to **Moving Day**

The **Transition Plan** that you and your planning team developed must cover a lot of details—every single thing that is needed for you to move safely, and to have all the services you need in place when you need them.

Here are some things that will happen, leading up to your move:

- You will meet all the direct service workers you have chosen, if you haven't already.
- You will probably visit the places where you will work or volunteer. The service providers who will take care of your supports after you move may spend time at the Qualifying Facility, getting to know you better.
- Your Transition Specialist will go over your moving plan with you and your family (or guardian or legal representative). If you all decide that it is a good idea for you to move into your new place, you or they will sign a paper agreeing to it.
- Your new home or apartment will be fixed up, if necessary, so that it is accessible to you.

Also, the **Transition Specialist** will help you and your family buy the furniture and kitchen and bathroom supplies that you will need. If you are going to have roommates, this could be something you will enjoy doing together.

A Qualifying Facility staff person may come with you on an overnight visit to your new place, or they may visit you after you move.



- You may get a new doctor and dentist, or other special healthcare provider. When you move you will have the prescription drugs you need, and your prescriptions will be transferred to a pharmacy near your new home.
- If you will be working in the community for the first time in your life, you may need some new clothes. MFP can pay for this.
- If you are using the Consumer Choices **Option (CCO)**, you will be enrolled with the Financial Management Services, which will help you manage your individual budget. Your Transition Specialist and your Independent Support Broker will help you line up the services you will be self-directing after your move.

Your Transition Plan spells out what services have to be there for you the day you move in. It is the Transition Specialist's job to make sure that happens.

The "Demonstration Year"

Here you are in your own place! You and your roommates may be having fun, but there will probably be things you need to get used to.

Although it's best to give everything some time to work out, remember this: You never lose your right to choose who will provide you with your services, including the people who help you every day.

Your Transition Specialist will be meeting with you within two days after you move in. Then, you will meet again at least every month for the next year—and maybe more if they think it is necessary to make sure things are going well.

If you are not happy about something, tell your **Transition Specialist**. You and the Transition Specialist may decide that your Transition Plan needs to be changed in some way. You might need another service, or more hours of service, or you may want to change service providers.

You have the option to use a service called **Personal Emergency Response System** (PERS), sometimes called a "lifeline." People usually wear the PERS around their neck. If they are alone, they push the button in an emergency to get help if they've fallen, if they're lost, if their service worker hasn't shown up, or if they have any other serious trouble. This can be an important part of your emergency backup plan.



Your plan spells out what your service providers must do in emergencies. You and your family (or guardian or legal representative) should get to know this plan.

One of the most important things you and your team planned for before you left the Qualifying Facility was how you would spend your time during the day. If you did not have a job or a chance to volunteer lined up before you moved, it will be important for you and the service provider and the Transition **Specialist** to work together to find one now.

Work, volunteering, and taking part in things that you enjoy in your new community will help you make friends and be happy with your new situation.

Rights, responsibilities, and risks

You know that it is your choice whether to participate in the MFP program. Once you move to your own place, you have a right to stop participating in the program at any time. If that happens, you can apply to return to a Qualifying Facility.

However, there may not be an opening for you right away, so you would have to be put on a waiting list. **Qualifying Facilities** cannot afford to hold a place open for people who leave, just in case they want to come back.

Another choice, besides going back to the Qualifying Facility is to work with your **Transition Specialist** to solve any problems that have come up. You have a right to expect that your health and safety will be protected in the community, that all the services in your Transition Plan will be available to you when you need them, and that they will be of high quality. You have a right to be treated with respect, and to participate fully in decisions about your life and about your services and supports.

With this right comes your responsibility to tell people what you want. Money Follows the Person is funded with Medicaid dollars, and you have all the rights that any other Medicaid member has. Your Transition **Specialist** is the first person to contact if you have complaints or problems. If that doesn't work out the way you want, you can also call the Iowa Medicaid Member Services toll-free telephone number: 1-800-338-8366.

When you move to the community, you will also be given the phone number of the local office of the lowa Department of Health and **Human Services (HHS)**. You can call that number if you have complaints or problems. You should keep both of these numbers handy where you can find them easily.

You have a right to feel safe with the people who provide your supports and services. If anyone hurts you in any way, whether it is physical, or in the way they talk to you, or if they make you feel bad on purpose, your provider is required to report this to the state, and to take steps right away to make sure it doesn't happen again.

The state also wants to know if you are hurt by accident, or if someone who is supposed to provide services to you doesn't show up. Your **Transition Specialist** certainly wants to know too, and usually this would be the first person you talk to if you have a problem.

When you move to the community, you will also be given a card with the number to call if you ever stop feeling safe: 1-800-362-2178. This is the number of the state office that looks into "abuse and neglect"— situations where people are being treated badly or not getting the help they need.

If you think you are in an emergency situation, you should call **911** to get help right away. Don't hesitate. You should never be afraid to make this call just because of what someone might think.

No one can ever be completely safe. Accidents, or worries, or times of being afraid are part of everyone's life. As an **MFP** participant, you are reaching for more independence, and the satisfaction of trying new things—working to solve problems and start new relationships. Rights and responsibilities may not come without risks, but they can bring dignity and self-respect.

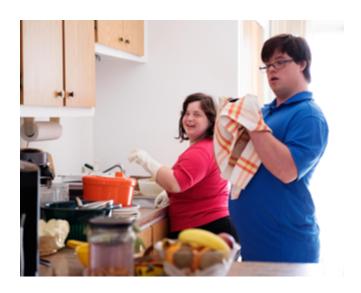
Leaving the MFP Program

At the end of your first year (your "Demonstration Year") in your new place, you will no longer be a participant in the MFP program. You will probably not notice anything different, except:

Your Transition Specialist will no longer be in charge of making sure you are getting what you need. That job will be given to a Community-Based Case Manager. If you are using the Consumer Choices Option (CCO), you can keep the same Independent Support Broker.

At the end of the first year, your Transition Specialist and your Community-Based Case Manager will work together to make sure you continue to have the services you need in order to live in the community. The Community-Based Case Manager will be part of your team during your Demonstration Year. You have the right to choose your Community-Based Case Manager. Now they will help you with your services moving forward. They will do a complete review of what you need and discuss with you how well your service plan is meeting those needs. This will happen every year.

You will continue to be able to access services from the MFP's Behavioral Support Specialist or Employment Specialist. You can ask anyone on your team to contact MFP for access to these services.



lowa Medicaid monitors all of the programs and services connected with **MFP** to make sure people are getting what they want and need. Their Quality Assurance specialists work together with your providers and your case manager to make sure you are getting the support you need and to make your dreams a reality.

Appendix A

Services for Iowa's Money Follows the Person Project

Qualified HCB Program Services

- ▶ Adult Day Care
- ▶ Consumer-Directed Attendant Care
- ▶ Day Habilitation
- ▶ Consumer Choices Option
- ▶ Home Health Aide
- ▶ Home/Vehicle Modifications
- ▶ Interim Medical Monitoring
- Nursing
- ▶ Personal Emergency Response System ("lifeline")
- ▶ Prevocational Services
- ▶ Respite Services
- Supported Community Living
- Supported Employment
- ▶ Transportation

Permanent services to be added:

- ▶ Mental Health Outreach
- ▶ Behavioral Programming
- ▶ Crisis Intervention Services

HCB Demonstration Services

- ▶ Transition Services Coordination
- Staff from your facility participating in trial overnights in the new community setting and training to help your new staff learn how to best support you
- ▶ Community service provider participation in transition planning and preparation
- Assistive Technology not covered in Intellectual Disability (ID) or Brain Injury (BI) Waiver
- Environmental modifications needed for safety
- Nurse delegation (training by a nurse or care provider in various tasks that would ordinarily be done by the nurse)
- ▶ Initial household setup costs (furniture, housewares, etc.)
- ▶ Durable Medical Equipment
- ▶ Clothing

Glossary of Terms

Community-Based Case Manager:

This is someone that will help the individual coordinate all services after the demonstration year has ended.

Consumer Choices Option (CCO): This is an option available to anyone participating in *Money Follows The Person* in Iowa. CCO gives people more flexibility and control over the budget for some of their services.

Demonstration Services: One of three kinds of services available to people participating in *Money Follows The Person*. Demonstration Services are extra services people might need in order to move successfully into their own place. They are available for the first year of their participating in the program. (See Appendix A.)

Demonstration Year: *Money Follows The Person* participant's first 365 days after they move into the community.

Financial Management Services (FMS):

The FMS is a bank or credit union that receives the funds for a CCO participant's service budget, makes payments on behalf of the participant, and helps to keep track of the funds.

Home and Community-Based Services (HCBS): Home and community-based services are available to people participating in *Money Follows The Person*, to help them live as independently as possible in their own homes and communities.

Independent Support Broker (ISB):

Someone chosen by CCO participants to help them develop their individual budget and to identify and obtain the services they need.

Interdisciplinary Development Team (IDT): A group of people chosen by a *Money Follows The Person* participant, with the help of the Transition Specialist, who knows the participant well and can help him or her

develop a Transition Plan that addresses all service and support needs for successful community living.

Intermediate Care Facility for People with an Intellectual Disability (ICF/ID): A residential facility certified under federal law that provides active treatment to people with intellectual disabilities and related conditions.

Iowa COMPASS: A free, statewide information and referral service for people with disabilities, their families, and service providers. The toll-free number to call for help is 1-800-779-2001. Anyone can also search the database of programs and services by going to www.iowacompass.org.

Iowa Department of Health and Human Services (HHS): The department responsible for overseeing a large number of programs serving groups such as people with low income and people with disabilities. Iowa Medicaid is a Division within HHS.

Iowa Medicaid: The state agency, within HHS, that oversees Iowa's Medicaid program, which is funded by the federal government with matching funding from the state and counties. Iowa Medicaid is responsible for running the *Money Follows The Person* program.

Medicaid: Federal funds under Title XIX of the Social Security Act that provide healthcare coverage for such groups as low income families, the elderly, and people with disabilities. *Money Follows The Person* is funded with Medicaid dollars.

Money Follows the Person (MFP): A program established by Congress to help states move people out of ICF/IDs, nursing homes, and other institutions, and into their own homes, with extra services and supports to help make sure the move is successful.

Nursing Facility: A residential facility that provides 24-hour care for individuals who need skilled or nursing care. Medicaid helps with the cost of the care.

Personal Emergency Response System (PERS): Sometimes called a "lifeline," a PERS is a small device that can be carried by a Money Follows The Person participant throughout the day and used to call for help in emergencies.

Qualified Facility: ICF/IDs, Nursing Facilities, PMICs, and inpatient hospitalization settings where a person resides

Qualified Residence: A home or apartment that meets the standards required by the Money Follows The Person program. It must be either

- (a) a home that the participant or a family member owns or leases;
- (b) an apartment that the participant leases, as an individual-with lockable doors, and with living, sleeping, bathing, and cooking areas that the participant uses as he or she wishes:
- (c) a community- based home in which no more than four unrelated people live.

Qualified Home and Community-Based Services (HCBS): Services available under Money Follows The Person that help a participant live successfully in the community and that are expected to be needed for a long time. (See Appendix A.)

State Plan Services: Medicaid services available to meet the healthcare needs of anyone eligible for Medicaid. Some State Plan Services provide the kind of long-term supports that Money Follows The Person participants may need to live successfully in the community. (See Appendix A.)

Supplemental Services: Short-term services available to participants to help them move successfully to their own place. (See Appendix A)

Supported Community Living: Services provided in the home and community according to a person's needs identified in the Transition Plan. These include personal and home skills training, individual advocacy services, community skills training, personal and environmental support services, transportation, and treatment services.

Transition: A carefully planned move by a Money Follows The Person participant from an Qualifying Facility to a Qualified Residence in a community of his or her choosing.

Transition Planning: The formal process in which the participant chooses a place to live, sets personal goals for community living, and chooses the services he or she will need to pursue those goals with the help of the Transition Specialist and the planning team. The team helps develop a plan that will support the individual and ensure his or her health and safety.

Transition Specialist: Someone who provides information about Money Follows The Person to facility residents and their families, who helps a participant develop a Transition Plan, and who also helps in coordinating all the services needed for the move to the community and for the Demonstration Year.

https://hhs.iowa.gov/programs/welcome-iowa-medicaid

Member Services: 1-800-338-8366 (Toll Free) 515-256-4606 (Des Moines Area) 515-725-1351 (Fax)

Email: IMEmember@hhs.iowa.gov

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