Veteran Directed Care Office Hour Session Two

August 4, 2021

Agenda

❑ **Welcome and Announcements from the Administration for Community Living (ACL)**

❑ **Recap of the first VDC Office Hour Session**

❑ **VDC Program Best Practice – Monitoring Monthly Veteran Spending**

❑ **Focused Topic Discussion**: *Tips and Tools to Monitor Monthly Veteran Spending – Monthly Service Reports*

❑ **Open Question and Answer (Q&A)**

❑ **Closing**

Announcements from ACL

Victoria Wright, Program Officer for Veteran Directed Care and Inclusive Transportation Programs
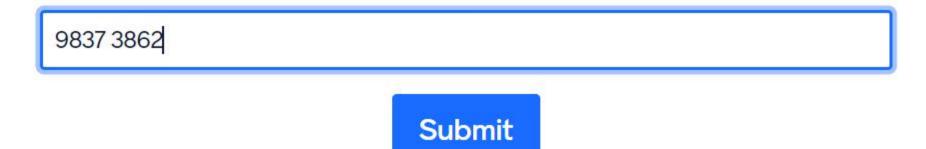
Menti Poll

- Go to **www.menti.com** and enter code 9837 3862

Have you reviewed the newly released Veteran Monthly Service Report Template?

Please enter the code

9837 3862

Submit

Recap of the VDC Office Hour Session One

- The first VDC Office Hour Session provided an overview of VAMC referrals, authorizations, and Veteran spending plans

- Additionally, the session provided tips for incorporating the newly released Monthly Spending Plan template into your VDC program's processes

- Resources from the first session can be found on ACL's No Wrong Door (NWD) website VDC page: https://nwd.acl.gov/vdc.html

My Organization is a VDC Provider

VDC providers are Aging and Disability Network Agencies (ADNAs) that have completed a VA VDC Readiness Review, have a fully executed provider agreement with the VA and are serving Veterans referred by their local VA Medical Center(s). The following resources are available to support program administration:

⊙ **NEW** VDC Billing and Invoicing Guide

This guide is a resource that outlines billing and invoicing procedures to assist with and ensure timely and accurate reimbursement for VDC invoices.

⊙ **NEW** VDC Monthly Services Report

VDC programs can use this Monthly Services Report template to track Veteran VDC spending by documenting actual spending.

⊙ **NEW** VDC Spending Plan

The VDC Spending Plan helps map how Veterans intend to use their VDC budget and estimate spending during their authorization period.

VDC Resources

VDC COVID-19 Information

VDC Office Hours

⊙ **July 2021**

VDC Office Hour Session One: Understanding VDC Veteran Authorizations and Developing Person-Centered Veteran Spending Plans

✓ Recording

VDC Office Hour Session One Key Takeaways

- Practical takeaways and actionable next steps were reported by participants including:

  ► Streamlining their authorization processes based on the guidance offered during the session;

  ► Incorporating the Veteran Spending Plan Template into their VDC program's processes for Veteran spending plan development; and/or

  ► Using the template as a guide to ensure that minimum requirements are met and included if using locally developed templates.

Remaining FAQs from VDC Office Hour Session One

FAQ: Veteran Spending Plans

> **Question:** We get our referrals from VA with an outline of how much personal care and respite we can provide. I'm not familiar with Spending Plans - is this something our VDC program should be doing?

- Response:
    - ► After completing the PCC assessment, the person-centered counselor helps the Veteran develop a person-centered spending plan that the VAMC will review, edit and/or approve.
    - ► VDC programs can use the <u>VDC Monthly Spending Plan Template</u> to build the Veteran's spending plan.
    - ► Supporting documentation from the PCC assessment must also be submitted with the VDC spending plan so that the VAMC understands how the Veteran intends to use their VDC budget to meet their individualized goals.

FAQ: Global Budget

> **Question:** What is a global budget?

- Response:
  - ▶ A "Global Budget" is the total budget that the Veteran has available during the authorization period.
  - ▶ "Global budget" guidance eliminates the need to account for "planned savings" that was previously used in VDC.
  - ▶ Veteran spending in a given month may exceed the **average** monthly case-mix rate. This is permissible as long as all spending is documented in the approved spending plan and **does not exceed** the Veteran's total authorized budget (the Veteran's global budget).

FAQ: How to Bill for the Assessment

> **Question:** With the global budget, does billing for assessment happen at referral or when actual start of services with approved budget?

- Response:
  - ▶ Once the VAMC approves the Veteran's person-centered spending plan, the VDC provider sends the VAMC an invoice for the full assessment fee.
  - ▶ The assessment fee is invoiced to the VAMC to reimburse the ADNA and FMS for supporting the Veteran with the person-centered assessment, VDC enrollment, in-home visit, development of the spending plan, and paperwork for employees of the Veteran.
  - ▶ If the Veteran does not enroll in VDC, the VDC provider submits an invoice for the partial assessment fee.
  - ▶ The partial assessment fee only includes the rate to reimburse the VDC provider for the PCC assessment conducted with the Veteran.
  - ▶ The VA establishes rates for the assessment or partial assessment fees. You may calculate your VDC program's estimated fees by using the VDC Fiscal Year 2021 Case Mix Rate Calculator.

FAQ: One-time Purchases

Question: How do you include one-time purchases for special items in the budget since it may only occur that one time?

- Response:
  - ▶ The Veteran spending plan should include an estimate of any one-time goods or services by dollar amount and estimated date of purchase.
  - ▶ In the Veteran Spending Plan Template, there is a specific table where one-time goods and services purchases can be documented.

One-Time Goods and Services Purchases

Category	One-Time Purchases	Vendor	Estimated Purchase Date	Estimated Cost
Small electric appliances	Fall detection camera	Target	1/4/2021	$120.00
Workers' compensation insurance	Workers' Compensation Insurance	Liberty Mutual	1/1/2021	$275.00
Home modifications or medical equipment	Grab bars	Home Depot	1/12/2021	$50.00
Home modifications or medical equipment	Walker	Walmart	1/4/2021	$45.00
			ESTIMATED ONE TIME PURCHASES:	$490.00

FAQ: Background Check

❯ **Question:** Are background checks mandatory or is it left up to the Veteran and/or their representative?

- Response:
    - ► State and local policy requirements regarding background checks may vary but it is recommended that Veterans complete a background check on all VDC workers.
    - ► VDC providers should follow state guideline requirements for workers and background checks.
    - ► Individuals with any history of fraud or abuse should not be employed as a worker in VDC.
    - ► Costs for background checks can be paid for using a Veteran's budget. In addition, costs for background checks do not require pre-approval from the VAMC but should be included in the Veteran's spending plan and can be invoiced for after approval of the VDC spending plan by the VAMC.

Focused Topic Discussion:
Tips and Tools to Monitor Monthly Veteran Spending – Monthly Service Reports

VDC Program Highlight

Delta Center for Independent Living & the St. Louis VAMC: Monitoring Monthly Veteran Spending

FAQ: Veteran Services Report Template

Question: Is there a template for yearly spending to see what is left in the budget throughout the year?

- Response:
  - ▶ VDC programs can use the <u>VDC Monthly Services Report Template</u> to track Veteran VDC spending by documenting actual spending.
  - ▶ The Monthly Services Report Template includes:
    - ❑ The Veteran's monthly case-mix rate;
    - ❑ The monthly administrative rate;
    - ❑ A breakout of goods and services purchased in a month by employee, good, and service; and
    - ❑ The total amount of invoices (which includes Veteran spending as well as the monthly administrative fee).

FAQ: Accessing Monthly Service Report Template

> **Question:** Where do we access the Monthly Service Report Template?

- Response:
    - ► VDC programs can use the VDC Monthly Service Report Template which can be accessed on ACL's NWD website's VDC page: https://nwd.acl.gov/pdf/VDC_Monthly_Services_Report_FINAL.xlsx
    - ► VDC providers should discuss with their VAMC the preferred method for sending Monthly Service Reports. Several options include uploading Monthly Service Reports to HealthShare Referral Manager (HSRM), sending via secure email, fax, or secure mail.
    - ► VDC providers should keep a copy of the completed Monthly Service Report for each Veteran in their VDC files.

FAQ: Mid-Month Authorizations

> **Question:** What are the administrative rates for mid-month authorizations?

- Response:
    - ▶ Veterans can enroll in VDC and start receiving services any day of the month. Veterans may also be discharged on any day of the month.
    - ▶ The administrative fee is paid in full regardless of the number of days in the month that the Veteran uses his or her budget.

FAQ: Updating Monthly Service Reports

> **Question:** What is the best practice for updating service reports?

- Response:
  - ▶ It is the responsibility of the Veteran, with support of the VDC provider, to track and monitor VDC spending and make any necessary changes to the VDC spending plan to ensure spending does not exceed the authorized budget.
  - ▶ Monthly Service Reports are crucial for monitoring Veteran spending against their authorized budget (global budget) and approved spending plan.
  - ▶ The VDC Monthly Service Report Template includes the following components to assist with tracking:
    - ❑ An Invoice Tracker, which provides a high-level view of the Veteran's actual spending for each month. The Invoice Tracker tab also includes space for VDC programs to track reimbursement and payment by the VA for services rendered each month.
    - ❑ Tabs for 12 calendar months, with an optional 13th month if services were rendered over the course of 365 days spanning 13 months.
    - ❑ Space for the VDC provider to input the Veteran's identifying information, the average monthly Veteran budget, the monthly admin fee, and the services and/or goods the Veteran purchases on a monthly basis, including information on emergency back-up care and planned purchases.

FAQ: Completing Monthly Service Reports

⟩ **Question:** Who is responsible for completing and submitting the Monthly Service Report? The FMS or the VDC provider?

- Response:
  - ▶ VDC providers are responsible for ensuring the accuracy and timely submission of Monthly Service Reports.
  - ▶ FMS providers can play a critical role in developing and submitting Monthly Service Reports.
  - ▶ VDC providers should have an established process with the VAMC, FMS providers, other subcontractors (i.e., Spokes), and Veterans for developing and submitting Monthly Service Reports.

FAQ: Veteran Spending

Question: What if the amount the Veteran wants to spend on services that aren't directly personal care is more than the amount for personal care?

- Response:
  - ▶ This is permissible as long as all spending is documented in the approved spending plan and does not exceed the Veteran's total authorized budget (global budget).
  - ▶ VAMCs are required to verify that all spending incurred by the Veteran is included in the approved spending plan. VAMCs will not reimburse for any services that are not included in the spending plan.
  - ▶ Tracking total spending during the authorization is crucial for monitoring spending and ensuring that total spending does not exceed the total authorized budget (global budget).

FAQ: Submitting Timesheets

Question: Are there strategies for following up with Veterans and/or VDC employees that do not timely complete timesheets, therefore delaying our ability to create Monthly Service Reports?

- Response:
    - ► Timely submissions of timesheets are critical to avoid delayed or incomplete reimbursement for VDC services.
    - ► VDC providers should adopt policies and procedures to assist in the timely submission of timesheets, to include:
        - ❑ An employment agreement between a Veteran and care provider can include a stipulation that the employee agrees to timely submit timesheets to the Veteran on an agreed upon schedule.
        - ❑ The employer agreement with a Veteran and/or authorized representative can emphasize that timesheets submitted late will be processed in the next payroll cycle.
        - ❑ A training and remediation policy can assist in following up and documenting consequences with continued noncompliance.

FAQ: Underutilization of Spending Plans

Question: Any tips on handling the underutilization of Veteran spending?

- Response:
  - ► The VDC provider should work with the Veteran to establish a spending plan that maximizes use of their available budget.
  - ► VDC providers may need to provide continued education and training to the Veteran, caregiver and/or employees:
    - ❑ Is the typical work schedule clear to everyone?
    - ❑ Why does the Veteran deviate from a set schedule?
  - ► The in-person person-centered counseling assessment is integral for conducting a comprehensive review of resources and informal supports.
  - ► The VDC provider may need to revisit and revise the VDC spending plan to make any necessary changes to ensure that the Veteran is maximizing use of their available budget to meet their support needs and goals.

FAQ: Using Monthly Service Reports

Question: Our Coordinator does not require the Monthly Service Report – should we submit them somewhere else?

- Response:
  - ► VDC providers are encouraged to work with their partnering VAMC(s) to determine documentation requirements to ensure appropriate accounting of monthly spending consistent with VAMC operations.
  - ► Monthly Service Reports are submitted to the referring VAMC(s) for two purposes:
    - ❑ VAMCs are required to verify that all spending incurred by the Veteran is included in the approved spending plan. VAMCs will not reimburse for any services that are not included in the spending plan.
    - ❑ VAMCs are required to verify that reimbursement to the VDC provider for a Veteran does not exceed the Veteran's authorized budget. Tracking total spending during the authorization is crucial for monitoring spending and ensuring that total spending does not exceed the Veteran's total authorized budget (global budget).

Menti Poll

- Go to **www.menti.com** and enter code 1285 9685

What is one change your VDC program could implement within the next three months for developing, reviewing, and sharing Monthly Service Reports?

Please enter the code

9837 3862

Submit

Closing

- **Post-event Survey:**
https://www.surveymonkey.com/r/VDC_Office_Hour_2

- **ACL Technical Assistance (TA)-Community**: Continue the conversation using the discussion board located in the VDC Community on the ACL TA-Community!

- **VDC Office Hours Session Three:** Managing VDC Invoices and Supporting Timely Billing

- **VDC Monthly Reporting Tool Data Entry**:
https://app.smartsheet.com/b/form/9bff196f995e4ddd82aa0fd246ae0501

- Please email the VDC Technical Assistance Team with any questions: veterandirected@acl.hhs.gov