Institute on Aging

FINANCIAL SIGN OF THE TIMES/ PROVIDER COLLABORATION

Learn how The Institute On Aging In San Francisco, CA, collaborated with local health plans to transition their members into available home and community-based resources that support community living.

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Institute on Aging

EMPOWERING OLDER ADULTS AND THOSE WHO CARE FOR THEM

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IOA's mandate is to be a leader for older adults, adults with disabilities, and their loved ones

Thought Leadership

- Founded out of Mount Zion Hospital (now part of UCSF) in 1975 to change how aging services were delivered
- Continuing ties to UCSF through co-located geriatric clinic and research collaborations
- Nationally-recognized voice on Elder Abuse, Suicide Prevention, Intensive Case Management, and other topics

Service Leadership

- Provide long-term supports and services and behavioral health for seniors and adults with disabilities
- Serve over 8,000 seniors and adults with disabilities across San Francisco, Marin, San Mateo and Santa Clara Counties
- Experience in the Medi-Cal population, with over 82% of clients below $24,000 annual income

Innovation Leadership

- Development of new models of care, e.g., Community Living
- Full integration of behavioral health into geriatric care
- Partnerships with Aging 2.0 and other technology providers

Our activities include research, education and service provision

Our **mission** is to enhance the **quality of life** for **adults as they age** by enabling them to **maintain their health**, **well-being, independence** and **participation** in the community

Medi-Cal / Medicare Services

- Program of All Inclusive Care for the Elderly (PACE)
- Intensive Case Management (SNF to home & diversions)
- Transitional Case Management (hospital to home)
- Long-term Case Management, e.g.,
    - Multi-purpose Senior Services (MSSP)
    - Linkages for younger, disabled adults
- Integrated Behavioral Health support

- *IOA Consults* evaluation and implementation support
- Elder Abuse Prevention & Forensic Center
- Academic collaborations
- Quality improvement & intervention design
- Elder Suicide Prevention
- Advocacy on aging issues

FFS & Private Pay Services

- Psychology & Counseling Services
    - Neuropsych testing
    - In-home psychotherapy
    - Friendship Line call service
    - Grief counseling
- Care & Case Management
- Home Care
    - Non-medical care
    - Medication management
    - Financial services
- Adult Social Day Clubs
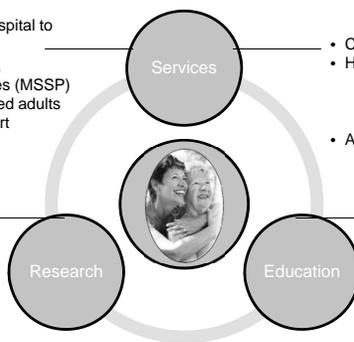
- IOA Connect information & referral service
- Volunteer Corps
- Psychology PhD internship & psychotherapy training program
- Speakers bureau & conferences
- Staff training programs

Services

Research

Education

We partner with other CBOs, counties, plans and providers in both our research and service efforts

Research /Education

- *IOA Consults*, our consulting arm, leverages our 40 years of experience to help you and your team better meet the needs of your high-need clients

- Our education program offers training on elder abuse, suicide prevention and other areas of expertise

Services

- Our Intensive Case Management programs, including Community Living, help your Medicaid/Medicare clients access the long-term care and services they need

- Our Transitional Case Management programs combine our community liaison expertise with hands-on care to help ease hospital-to-home moves

- Friendship Line, our unique Call-in hotline and Call-out service, is available for your clients who need someone to talk to when feeling lonely or down

- Our Home Care and Support Services provide home care, medication and care management and financial services for those in the Bay Area

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Case Management

Core to all of IOA's programs is our integrated case management approach

PACE program	Intensive case management focused on coordinating LTSS and medical care under our all-inclusive healthcare program in San Francisco
Home care	Case management in addition to home care, social day and other support services for our clients in the bay area
Community Living	Transitional case management in three Bay Area counties in partnership with government, health plans and social services agencies
MSSP	Long-term case management for older adults in San Francisco, focused on an integrated approach to LTSS
SF Community Programs	A range of programs in the SF community, ranging from Linkages for younger adults with disabilities to our Elder Abuse Prevent Center
Care Navigation	Partnerships with health providers and communities to help clients access needed community-based services

Community Living approach combines funding innovation and integrated care

Program Elements

- Targeting, Eligibility & Prioritization
- Coordinating HCBS Waivers
- Multi-disciplinary Core Group
- Intensive Transitional Care Management
- Housing & Placement Retention Services

- Based on IOA experience in San Francisco after Laguna Honda Hospital *Olmstead* decisions

- Goal is to transition clients currently in SNFs, and support those community members who may be at risk of institutionalization

- Combines psycho-social and housing support services to provide integrated community support for SNF residents and SNF eligible clients

- Targets SNF spending, the next bucket of avoidable spend, in addition to impacting ED and Inpatient use

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Community Living is currently in use in San Francisco, San Mateo, and Santa Clara

San Francisco: Community Living Fund	San Mateo: Community Care Settings Program	Santa Clara County
• County-sponsored program in response to *Olmstead*-related decisions regarding Laguna Honda Hospital clients	• Multi-stakeholder partnership between San Mateo County, Health Plan of San Mateo, Brilliant Corners and IOA	• Multi-stakeholder partnership between Santa Clara County and IOA; In discussions with local managed care plans
• Collaboration between DAAS, DPH, IOA and other social service providers (administered by IOA)	• Targeting both Cal MediConnect and Managed Medi-Cal members	• Targeting both Cal MediConnect and Managed Medi-Cal members
• For older adults and adults w/ disabilities at 300% of the federal poverty line and remaining in the community	• Goal is 150 clients transitioned/yr at scale	• Goal is 150 clients transitioned at scale
• Serves ~350 clients at a time	• Program launched Fall 2014; average community stay length is now 7+ months	

Case study: San Mateo Client Stories

Meet Janet…
- 49 years old, divorced
- Evicted from Section 8 unit
- Living in car due to MDD episode and in-patient stay
- Admitted to SNF for rehab following complications from a hysterectomy.
- At her LTC for almost a year

With Community Living:
- Secured a Scattered Site unit at a large apartment complex
- Connected to BHRS and previous PCP
- Now in community for over 5 months

Meet John…
- 65 years old, divorced
- Admitted to the SNF for rehab following a stroke.
- Poorly managed diabetes, leading to diabetic retinopathy

With Community Living:
- Care managers helped him better manage diabetes through an insulin pen and self-management training
- Secured spot in RCFE with a dog
- Applied to volunteer at SPCA
- Connected with additional services through Medicare - SNP plan

> Let's make the world a better place…let's push the envelope and see what happens.
>
> *-Rhoda Goldman*
> *Founder, IOA*

Institute on Aging

TECHNOLOGY ASSESSMENT

Presentation Outline

•Institute on Aging

- •Market
- •Internal Assessment
- •Key Criteria – Drive Decision Making Process
- •Final Technology Solution
- •Where Are We Today

Market Drivers

- Technology that can be flexible in its configuration in order to be responsive to a changing market climate
- Interoperability (i.e., data exchange)
- Electronic health record

Internal Assessment

Known System Related Challenges/Topics

Data/Information Management	Business Process and Management
• Management Reporting • Marketing Intelligence • Decision Support • Grant covenant reporting • Data Integrity • Data management (standards, etc.) • Information sharing between programs • ioaConnect (referral, enrollment, follow-up, warm hand-offs, call center function) • Connectivity to external partners while maintaining internal continuity and connectivity	• Enterprise complexity with mid-size organization resources • Undocumented processes • Even worse - undefined processes • Solid leadership team, but lack analytical and reporting tools to facilitate accountability and performance measurement • Need for virtual real time reporting • Strong desire to partner externally for growth

Internal Assessment

Strategic Initiative: Growth

Enterprise-wide Systems

Redesign business processes to support growth of current programs

Align Information Systems to support desired processes and decision making

Establish new partnerships = external connectivity

Internal Assessment

Strategic Initiative: Integration

ioa connect

Centralized client information

Referral & Assessment (one point of entry)

Call Center Support

Key Decision Criteria

- Evaluation of potential vendors – Top Three Qualities

  - Robust and scalable solution to support current & future operations
  - Demonstrable investment in technology and professional services
  - Reputation for excellent service in technology upgrades and collaborative projects.

Procura | Software Solution Overview

Client Management	Organization Management	Financial Management
	Workflow & Operational Management	EDI (Electronic Data Interchange)
	Business Intelligence	

Procura | Software Solution Overview

Client Management

- Electronic Health Record (EHR) and one time entry of data
- Case management, integrated care and service planning
- Multi-disciplinary assessments and clinical documentation templates
- Built-in alerts and workflow triggered by events
- Integrated mobile solutions
- Document Management

Procura | Software Solution Overview

Financial Management

- Cascading billing calculations and integrated Payment Processing (A/R)
- Custom and pre-configured reporting tools and dashboards
- EDI for Accounting/Payroll and Co-Payment Billing
- Time and attendance management
- Full audit and exception management

Procura | Software Solution Overview

Workflow & Operational Management

- Rules engine generates alerts
- Escalation as defined
- Reporting

Procura | Software Solution Overview

Workflow & Operational Management

- Client Status Changes
- Assessment Changes
- Episode of Care Changes
- Employee Data Entry Actions
- Processing Actions (Calculate Billing, Timekeeping)

Where Are We Today

- Homecare fully implemented since June 2014.
  - Planning to implement Procura Mobile.
- Health Plan of San Mateo implemented July 2014.
  - Optimizing several workflows
    - Purchase of Service
    - Electronic Billing
    - Reporting
- Implementing other Internal Programs
  - Day Programs
  - Psychology Assessments
  - Other Case Management Programs