

AGING STRATEGIC ALIGNMENT PROJECT

State Profile for

OKLAHOMA

Home- and Community-based Services for Older Adults and Adults with Physical Disabilities

Background

- Oklahoma's 60+ population was 677,530 in 2008 (18.6% of the state's total population), with 10.6% below the federal poverty level.¹
- The 60+ population is projected to be 930,178 in 2025 (24.3% of the state's total population).²
- About 23.9% of all households in 2007 had one or more persons age 65 years and over, and 46.6% of persons age 65 years and older had a disability.³
- Of the 625,875 Medicaid beneficiaries in the state in 2003, 8.4% were aged, 12.1% were blind and disabled, 15.5% were Dual Eligible, and 3.0% were HCBS waiver beneficiaries.⁴
- Medicaid expenditures for institutional long-term care were 57.5% of total long-term-care expenditures, compared to 42.5% for HCBS in fiscal year 2007.⁵

Abbreviations

AAA	Area Agency on Aging
ADL	Activities of Daily Living
AoA	Administration on Aging
CMS	Centers for Medicare and Medicaid Services
HCBS	Home- and Community-based Services
IADL	Instrumental Activities of Daily Living
MRDD	Mental Retardation and Developmental Disabilities
OAA	Older Americans Act
PACE	Program of All-inclusive Care for the Elderly
SUA	State Unit on Aging

¹ Department of Health and Human Services, Administration on Aging. (2009). *AGing Integrated Database (AGID): American Community Survey (ACS) demographic data 2004-2007 and state-level population estimates data 2000-2008* [Data files]. Available from <http://198.136.163.234/default.asp>

² Department of Health and Human Services, Administration on Aging. (2009). *AGing statistics: Projected future growth of the Older population; By state: 2005-2030; Aged 60 and above* [Data files]. Available from http://www.aoa.gov/AoARoot/Aging_Statistics/future_growth/future_growth.aspx.

³ Reimbursement and Research Department, American Health Care Association. (2006, August 29). *The state long-term health care sector 2005: Characteristics, utilization, and government funding*. Washington, DC: Author.

⁴ U.S. Census Bureau, 2007 American Community Survey, United States and States. *Percent of households with one or more people 65 years and over* (R1104) and *Percent of people 65 years and over with a disability* (R1803).

⁵ Burwell, B., Sredl, K., & Eiken. S. (2008, September 26). *Medicaid long term care expenditures FY 2007*. Eagan, MN: Thomson Reuters.

Government Structure to Manage HCBS

- **SUA:** Aging Services Division, Oklahoma Department of Human Services.
www.okdhs.org
- **State Medicaid Agency:** Oklahoma Health Care Authority.
www.ohca.state.ok.us
- Oklahoma does not have a consolidated agency for long-term-care programs. The following agencies handle long-term care: Oklahoma Health Care Authority; Oklahoma Department of Human Services, Aging Services Division; and the Oklahoma State Department of Health.
- The director of Oklahoma's SUA reports to the director of the Department of Human Services, who reports to Secretary for Human Services, who reports to the Governor.
- Oklahoma has 11 Area Agencies on Aging.

Single Point of Entry (SPE)/Aging and Disability Resource Center (ADRC)

- Oklahoma does not have an SPE or ADRC.

Assessment Process

Medicaid

- For Medicaid applicants, in determining functional eligibility for nursing home pre-admission, Oklahoma does not require an in-person assessment by someone other than nursing home staff. Most assessments are done after admission.

Non-Medicaid

- For non-Medicaid applicants in Oklahoma, nursing home pre-admission assessment is not required.

State Medicaid Plan

- Oklahoma provides personal care through the state Medicaid plan.

- Refer to Table 1 for specific services provided.

- **PACE:** Oklahoma has one PACE site started in 2008 by the Cherokee Nation.

Medicaid Waivers

- Oklahoma has one waiver that provides HCBS to older adults and/or adults with physical disabilities. This is: ADvantage Program.
- **ADvantage Program:** This program serves those age 65 and older and those age 21 and older who have physical disabilities. A consumer-directed option, called CDPASS, is being piloted in Tulsa County and only covers personal care assistance; the participant in the consumer-directed option recruits, hires, fires and manages the hired service provider. The participant in the consumer-directed option is assisted by a case manager and uses the services of a fiscal intermediary. The income limit for an individual is 300% of the federal poverty level and the asset limit is \$2,000; couples are treated as individuals. Once the Medicaid unit has determined financial eligibility, the applicant is referred to SUA nursing staff for functional eligibility determination.
- Refer to Table 2 for an overview of selected HCBS programs. Table 1 shows the types of services offered under each program.

CMS-funded Programs and Grants

- Oklahoma has one CMS-funded program and grant that provides HCBS to older adults and/or adults with physical disabilities. This is Money Follows the Person.
- **Money Follows the Person:** This program is for those aged 19 and older with MRDD or a chronic disability or illness. The assessment is done by a transition coordinator using the same tool as for the ADvantage Program (the Uniform Comprehensive Assessment Tool). The transition coordinators also provide case management services; these persons are certified and employed by various entities including Centers for Independent Living. The income level for qualified individuals is 185% of federal poverty level

(FPL) and the asset limit is \$2,000. About 2,000 persons are targeted for transition.

- Refer to Table 2 for an overview of selected HCBS programs. Table 1 shows the types of services offered.

State-funded HCBS Programs

- Oklahoma has one state-funded program that provides HCBS to older adults and/or adults with physical disabilities. This is: Adult Day Health Care.
- **Adult Day Health Care:** This program serves those age 60 and older and individuals age 21 and older with physical disabilities. The Adult Day Health Care service is also offered under the ADvantage Program to ensure that all participants eligible for Medicaid are funded under it because state funds are very limited. For the state program, the individual income level is \$2,084 and the income level for couples is \$4,168, with no asset limits. There is no functional assessment required for applicants age 60 and older for the state program; for those under age 60, a statement from their physician is required for eligibility. All participants in the program must need socialization services and the caregiver must require respite services.
- Refer to Table 2 for an overview of selected HCBS programs. Table 1 shows the types of services offered.

Locally Funded HCBS Programs

- Oklahoma uses local funds for HCBS for older adults and/or adults with physical disabilities.
- Local funds are used as a match for Title III (OAA) funds.

OAA-funded Programs and Grants

- Refer to Table 1 for services provided through Title III of the OAA.
- Oklahoma does not use cost-sharing mechanisms or sliding fee scales in the delivery of Title III services.
- Oklahoma has one other OAA-funded program and grant that provides HCBS to older adults and/or

adults with physical disabilities. This is: Living Longer, Living Stronger, Evidence-based Wellness Grant.

Social Service Block Grants (SSBG) and Community Service Block Grants (CSBG) for HCBS

- Oklahoma uses SSBG to provide HCBS for older adults and/or adults with physical disabilities.
- SSBG funds are used for congregate meals (\$4,573,273 in 2007), adult day care (\$1,003,000 in 2007) and adult protective services (\$5,697,776 in 2007).
- Oklahoma does not use CSBG to provide HCBS for older adults and/or adults with physical disabilities.

Consumer Direction

- Oklahoma is piloting one consumer-directed option in its ADvantage Program, which covers personal care services. Vouchers are used for caregiver respite services.
- Those permitted to provide services under consumer direction in Oklahoma are: adult children, other family members, friends, and provider agencies.
- All providers must be approved by the Department of Human Services. A legally responsible adult may provide services under consumer-directed options if no other provider option is available.
- Oklahoma uses one fiscal intermediary service in connection with consumer direction.
- A consumer-directed option is included in the Money Follows the Person Program.

Managed Care

- Oklahoma does not have HCBS programs run by managed care health plans.

Major Accomplishments and Initiatives

- The Department of Human Services has assumed direct responsibility for the administration of the AD-vantage Program, which previously had been outsourced, and has received approval to offer an assisted living services option in its Medicaid waiver program.
- The department is working towards receiving funding for an SPE (ADRC) and expanding its consumer-directed options.
- The department also anticipates implementing an integrated voice response system for its personal care attendant program, which it has piloted with successful results and significant cost savings.
- There are concerns about how the growing number of severely physically disabled younger adults will be served when they reach 21 and are no longer eligible for current state programs unless they have MRDD.

Table 1: Types of Home- and Community-based Services Provided Under Oklahoma's Programs for Older Adults and Adults with Physical Disabilities

Types of Services	Program Type / Funding Source				
	Medicaid Waivers	CMS-funded Programs and Grants	State-funded Programs		
	ADvantage Program	Money Follows the Person Nursing Facility Transition Grant	Adult Day Health Care	State Medicaid Plan	OAA Title III
Adult Day Care / Adult Day Health	X	X	X		
Assisted Living	X				
Caregiver Services / Respite / Education	X	X			X
Case Management / Care Coordination	X	X		X	X
Chore / Homemaking	X	X			X
Companion Services / Socialization Activities		X			
Employment		X			
Equipment / Supplies / Modifications / Assistive Technology	X	X		X	
Health Promotion Activities					X
Home Health / Personal Care	X	X		X	
Information / Assistance / Referral					X
Legal Assistance / Financial Advice	X				X
Medical / Dental / Medication Care	X	X		X	
Mental and Behavioral Health Services		X		X	
Nursing	X	X		X	
Nutrition / Meals	X	X			X
Personal Supports for Community Living / Transitioning		X			
Rehabilitation / Therapy	X	X		X	
Residential Services					
Transportation		X		X	X
Other/Unspecified HCBS					X

Table 2: Selected HCBS Programs for Older Adults and Adults with Physical Disabilities in Oklahoma

Program Type / Funding Source		Ages Served	Nursing Home Level of Care Required	Entity Responsible for Functional Assessment	Entity Responsible for Financial Assessment	Entity Responsible for Case Management	Waiting List (Number)	Consumer Direction Option
Medicaid Waivers	ADvantage Program	Age 65+ or Age 21+ with a physical disability	Yes	State Agency: Aging Services Division, Department of Human Services	State agency: Department of Human Services	Private Case Management Entities	No	Yes
CMS-funded Programs and Grants	Money Follows the Person Nursing Facility Transition Grant	Adults, age 19+ with MRDD or chronic disabilities or illnesses	Yes	Transition Coordinators	State agency: Department of Human Services	Varies	No	Yes
State-funded Programs	Adult Day Health Care (part of the Advantage Program)	60+ and 21+ with a physical disability	No	Physician	State agency: Department of Human Services	No case management	No	No