

**California Department of Aging (CDA) Community-Based Adult Services (CBAS)  
IPC Revision Workgroup Meeting Summary  
Wednesday, December 2, 2015  
1:30p.m. to 4:00p.m.**

**Attendees (In-Person): 10**

**Webinar Participants Registered: 18**

Agenda Topics	Discussion Highlights
<b>Welcome, Introductions and Overview of Meeting Agenda and Objectives</b>	
<b>Review of October 7<sup>th</sup> Meeting, CBAS Website, Workgroup Charter</b>	
<p><b>Complete IPC Revision Work Tool</b></p> <ul style="list-style-type: none"> <li>• Cross-check required elements with IPC</li> <li>• Discuss person-centered care planning &amp; interdisciplinary care team concept</li> <li>• Consider overlapping quality elements</li> </ul>	<ul style="list-style-type: none"> <li>• Workgroup members raised the following IPC revision issues for discussion based on the October 7<sup>th</sup> meeting overview of the IPC: <ul style="list-style-type: none"> <li>○ Identify audiences for IPC regarding its purpose (TAR authorization, care management, care coordination, eligibility determination, auditing, other)</li> <li>○ What information do managed care plans need?</li> <li>○ Determine if CBAS eligibility criteria need to be included in IPC</li> <li>○ Need more discussion about Primary/Secondary Diagnoses and Medications</li> <li>○ Need more discussion about referral to mental health services (Box 10)</li> <li>○ Planned and unplanned/emergent care</li> <li>○ Use IPC as communication tool about other service needs and other services utilized</li> <li>○ Clarify hierarchy of person-centered plans (CBAS IPC person-centered plan vs overarching plan/managed care plan )</li> <li>○ Document on IPC services used by CBAS participants outside the CBAS center (IHSS, transportation, other services)</li> <li>○ Review previous iterations of IPC-what has changed?</li> <li>○ Use of the Summary Page</li> </ul> </li> </ul>

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	<ul style="list-style-type: none"> <li>○ Other supporting documents to IPC (Participation Agreement, other)</li> <li>○ Clarify language used in IPC: problem statement, needs, strength-based, functional language/level of functioning, diagnoses, balance strengths and needs, health risks</li> <li>○ CBAS alone can't address all needs-refer to community services</li> <li>○ Address care coordination</li> <li>○ Identify measurable outcomes-behavioral anchors</li> <li>○ Eliminate duplication of info</li> <li>○ What is minimal amount of information needed to meet requirements</li> <li>○ Identify right level and frequency of services</li> <li>○ Identify measurements and how they relate to frequency of services</li> <li>○ Identify social determinant health codes (ICD-10)</li> <li>○ Identify/stratify participant risk factors</li> <li>○ Determine how needs/risks translate into authorized days of service</li> <li>○ Discuss how managed care plans determine how many days per week of services are needed to achieve participant goals</li> <li>○ Consider different approach to care planning- Interdisciplinary Team model (organized by problem/need, not by discipline)</li> <li>○ The "person" is missing in the IPC</li> <li>○ Invite software vendors to participate in the IPC redesign</li> <li>○ Discuss value of checkboxes, narrative, Summary Page and for what purpose</li> <li>○ Draft some prototypes of IPC that have various sections based on audience/purpose</li> <li>○ Determine how to reflect/document change in participant's condition</li> </ul>

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	<ul style="list-style-type: none"> <li>○ Discuss how to use flow sheets and monthly progress reports</li> <li>○ Determine what information is needed to meet state and federal requirements and participants' needs</li> <li>○ Determine how to address quality output in IPC</li> </ul> <ul style="list-style-type: none"> <li>● Workgroup members discussed the need to focus on care coordination issues and recommended the formation of a subgroup to identify what information managed care plans and CBAS providers need to exchange to coordinate care and provide services. The subgroup will consider requirements listed in the CBAS provisions of the 1115 Waiver, and All Plan and Dual Plan Letters issued to managed care plans by DHCS as well as in managed care plan contracts. Gretchen Brickson (LA Care) volunteered to facilitate this subgroup.</li> <li>● Add "Assessments" to CBAS IPC Revision Work Tool in "Other Document or Activities" column.</li> </ul>
<b>Identify Overlapping Issues for Quality Workgroup</b>	<ul style="list-style-type: none"> <li>● IPC is a receptacle for quality information</li> <li>● Revised IPC and standardized forms will move quality forward</li> </ul>
<b>Action Items/Next Steps</b>	<ul style="list-style-type: none"> <li>● Attached are the Action Items from the December 2<sup>nd</sup> Meeting</li> </ul>

**CBAS IPC Revision Workgroup Meeting  
December 2, 2015  
Action Items**

Action Items	Status
1. Revise and post CBAS IPC Revision Workgroup Charter	<ul style="list-style-type: none"> <li>• Completed</li> </ul>
2. Revise/Complete IPC Revision Work Tool <ul style="list-style-type: none"> <li>• Insert “Assessments” in CBAS IPC Revision Work Tool Column “Other Document or Activities”</li> <li>• Continue IPC Revision Work Tool Discussion/Completion</li> </ul>	<ul style="list-style-type: none"> <li>• In progress</li> </ul>
3. Review All Plan Letter on Care Coordination (14-010) <ul style="list-style-type: none"> <li>• Discuss at February Meeting</li> <li>• Add Care Coordination to IPC?</li> <li>• Post APL 14-010 on CDA website</li> </ul>	<ul style="list-style-type: none"> <li>• To do</li> </ul>
4. Review eligibility screening tool (best practice) <ul style="list-style-type: none"> <li>• Continue discussion about eligibility screening tool and how to adapt for IPC</li> </ul>	<ul style="list-style-type: none"> <li>• In progress</li> </ul>
5. Establish sub-groups for work in-between meetings <ul style="list-style-type: none"> <li>• Form sub-group comprised of managed care plans and CBAS providers to determine what information managed care plans need from CBAS providers to coordinate care such as reporting change in participant’s condition. Refer to CBAS Waiver requirements 98(c)(i) and APL 14-010. Gretchen Brickson (LA Care) volunteered to facilitate the sub-group.               <ul style="list-style-type: none"> <li>○ Distribute invitation to CBAS IPC Revision Workgroup members to participate in sub-group and clarify the sub-group’s charge</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• In progress</li> </ul>

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<b>Action Items</b>	<b>Status</b>
6. Continue discussing IPC Revision Issues	<ul style="list-style-type: none"> <li>• In progress</li> </ul>
9. Draft IPC Revision Prototypes for Workgroup Review	<ul style="list-style-type: none"> <li>• To do</li> </ul>
10. Invite CBAS Software Vendors to participate in IPC Revision Workgroup to assist in IPC redesign	<ul style="list-style-type: none"> <li>• To do</li> </ul>
11. Post The SCAN Foundation articles on Person-Centered Planning on CBAS Workgroup Webpage	<ul style="list-style-type: none"> <li>• In progress</li> </ul>
12. Determine February 2016 Meeting Date for both workgroups: <ul style="list-style-type: none"> <li>• 1st or 2<sup>nd</sup> Wednesday (depending on room availability)</li> <li>• Survey Workgroup members to determine best date for majority of members to attend in person</li> </ul>	<ul style="list-style-type: none"> <li>• In progress</li> </ul>