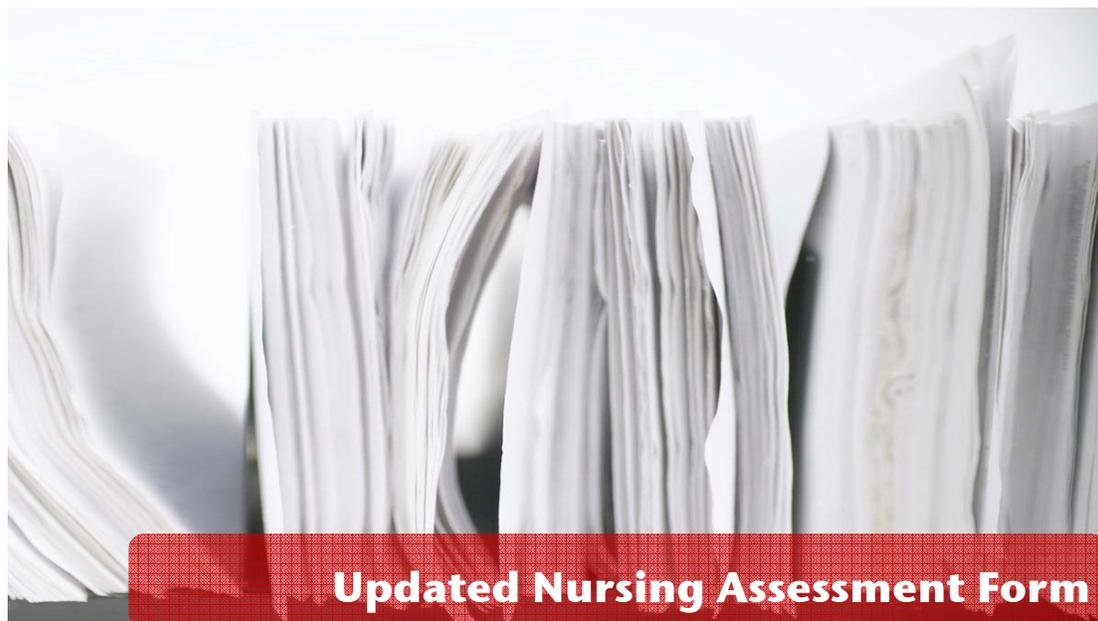


Dedicated to promoting success in the AD<sup>08</sup>antage Program



### Field Added to Nursing Assessment Form

The name of the Home Care Agency has been added as a field to the (ADv6) Nursing Assessment Form (See Figure 1.1). The updated form can be found at [www.ltca.org/Forms.aspx](http://www.ltca.org/Forms.aspx).

Figure 1.1

County

**NURSING ASSESSMENT/MONITORING FORM**  
(Please send a copy to AD<sup>08</sup>antage case management)

Consumer Name					
		Last		First Middle	
Address					
		Street		City State Zip	
Medicaid #		DOB		Home Care Agency	

### Budget Situation to be Topic of Upcoming Meeting with OKDHS Director Howard Hendrick

OKDHS Director, Howard Hendrick, will be meeting with systems stakeholders on Wednesday, March 26, 2008 to discuss the current budget situation as it relates to the AD<sup>08</sup>antage Program. All stakeholders are invited to attend. The meeting will be held from 1:30 pm—3:00 pm in Room C-47 of the Sequoyah Building located in the Capitol Complex at 2400 North Lincoln Boulevard, Oklahoma City.

### OKDHS Works Group to Meet

The Environmental Modification Process Work Group will meet on April 14<sup>th</sup> from 1:00 pm – 4:00 pm in the Roy Keen Conference Room at the OKDHS Aging Services office.

The CM/ADH Communication Work Group will meet on March 27<sup>th</sup> from 1:00 pm – 4:00 pm in the small conference room at the OKDHS Aging Services office.



## CMS Issues Proposed Rule to Empower Medicaid Beneficiaries to Direct Personal Assistance Services

A proposed rule that would allow more Medicaid beneficiaries to be in charge of their own personal assistance services, including personal care services, instead of having those services delivered by an agency, was announced by the Centers for Medicare & Medicaid Services (CMS) in January 2008.

The rule would allow Medicaid beneficiaries who need help with the activities of daily living to hire, direct, train and fire their own personal care workers rather than working with employees of an agency. Beneficiaries could even hire qualified family members who may already be familiar with the individual's needs to perform personal assistance (not medical) services.

"This proposal would give Medicaid beneficiaries significant new freedom to determine how their personal assistance services are delivered and by whom," said Kerry Weems, CMS acting administrator. "As health care is not simply an economic transaction, this proposal represents a fundamental shift that restores a person's ability to improve their overall health by taking greater control of his or her own decision," Weems said.

If a state adopts a self-directed personal assistance service state plan option, beneficiaries could receive a cash allowance to hire their own workers to help with such activities as bathing, preparing meals, household chores and other related services that help a person to live independently. Allotments could also be used to purchase items that help foster independence such as a wheelchair ramp or microwave oven. The beneficiaries also have the option to have their cash benefit allotment managed for them.

The proposal would put into place a provision of the Deficit Reduction Act of 2005 that allows states to elect a state plan option to provide care in ways that previously required "waivers" of previous Medicaid laws. Such waivers are subject to certain budgetary requirements and are temporary in nature.

Before a state could request this change to its state plan, the state must have an existing personal care services benefit, or be operating a home or community-based services wavier program.

Furthermore, enrollment in this new state plan option is voluntary and the state must also provide traditional agency-delivered services if the beneficiary wishes to discontinue self-directed care.

States choosing this option must have necessary quality assurances and other safeguards in place to assure the health and welfare of participants. States must also train potential participants to manage their budgets and assess their personal care needs.

Source: Centers for Medicare and Medicaid Services (CMS)

## Who is Eligible for an Economic Stimulus Check?

To help spur a slowing economy, the IRS will send tax rebate checks to over 130 million households beginning in May 2008 and continuing through the summer. Generally, a person who has more than \$3,000 in income is eligible. Even if a person does not have earned income, they can still qualify for a stimulus tax rebate check if their Social Security benefits, Veteran's Affairs (VA) benefits, and/or railroad retirement benefits equal at least \$3,000 annually. To qualify, the person must file a 2007 tax return on IRS Forms 1040 or 1040A with the IRS.

Questions about the stimulus package can be answered by contacting Hilary Dalin at the National Council on Aging at 202-479-6626 or at [www.ncoa.org](http://www.ncoa.org).

Do you serve a Member who needs assistance filing a tax return? The Tax Counseling for the Elderly (TCE) Program provides free tax help to people age 60 or older. Call 1-888-227-7669 or visit the AARP website.

Source: National Council on Aging, 2008

## IRS Releases Scam Reports Affecting Taxpayers

The Internal Revenue Service warned taxpayers to beware of several current e-mail and telephone scams that use the IRS name as a lure. The IRS expects such scams to continue through the end of the tax return filing season and beyond.

The IRS cautioned taxpayers to be on the lookout for scams involving proposed advance payment checks. A scam which uses the economic stimulus tax rebate check has already cropped up. The goal of the scam is to trick people into revealing personal and financial information such as Social Security, bank account or credit card numbers, which the scammers use to commit identity theft.

Typically, identity thieves use a victim's personal and financial data to empty the victim's financial accounts, run up charges on the victim's existing credit cards, apply for new loans, credit card services or benefits in the victim's name, file fraudulent tax returns or even commit other crimes. Most of these fraudulent activities can be committed electronically from a remote location, including overseas.

Most recent scams include a rebate phone call and a refund e-mail. In the rebate phone call scheme the victim receives a phone call from someone identifying himself as an IRS employee. The caller tells the targeted victim that he is eligible for a sizable rebate for filing his taxes early. The caller then states that he needs the target's bank account information for the direct deposit of the rebate. If the target refuses, he is told that he cannot receive the rebate.

The IRS does not force taxpayers to use direct deposit. Those who opt for direct deposit do so by completing the appropriate section of their tax return, with bank routing and account information, when they file. The IRS does not gather the information by telephone.

The IRS has seen several variations of a refund-related bogus e-mail which falsely claims to come from the IRS, tells the targeted victim that he is eligible for a tax refund for a specific amount and instructs the recipient to click on a link in the e-mail to access a refund claim form. The form asks the victim to enter personal information that the scammers can then use to access the e-mail recipient’s bank or credit card account.

The IRS does not send unsolicited e-mail about tax account matters.

Filing a tax return is the only way to apply for a tax refund; there is no separate application form. Taxpayers who wish to find out if they are due a refund from their last annual tax return filing may use the “Where’s My Refund?” interactive application on the IRS web site. The only official IRS web site is located at [www.irs.gov](http://www.irs.gov).

Source: Internal Revenue Service

## Conference Connection

The following table lists long-term care and home and community-based related conferences. If you have other conference information you would like to see listed in the ADvantage In-Focus, please e-mail the conference information to [provider?@ltca.org](mailto:provider?@ltca.org).

### Conference Connection

2008 Symposium on Strengthening the HCBS Direct Service Workforce	Sponsored by the US Department of Labor and the US Department of Health and Human Services
May 8-9, 2008 Baltimore, Maryland	<a href="mailto:info@dswresourcecenter.org">info@dswresourcecenter.org</a> or call 1-877-822-2647
Wound Care Challenges	Hosted by PESI Health Care, LLC
May 13, 2008—Tulsa May 14, 2008—Oklahoma City	<a href="http://www.pesihealthcare.com">www.pesihealthcare.com</a> or call 1-800-843-7763
National Healthcare Decisions Day 2008	Sponsored by the Oklahoma Palliative Care Resource Center at the OU College of Nursing, the Oklahoma Hospice and Palliative Care Association, and the Attorney General’s Task Force to Improve End-of-Life Care.
April 16, 2008—OU College of Nursing	<a href="http://www.okpalliative.nursing.ouhsc.edu">www.okpalliative.nursing.ouhsc.edu</a> or call Sandra at 405-271-2062