Honoring Choices Wisconsin

Advance Care Planning Pilot
March – August, 2013

Community Care, Inc.

- Managed Care Organization
- Publicly funded (Medicaid/Medicare)
- Serve 11 counties in WI
- 9600 members served
- Long-term care as well as acute and primary in three programs
Target Populations for the Pilot

- Family Care, PACE and Partnership Programs
- Waukesha and Waupaca Counties
- Frail elders, physical or development / intellectual disabilities
- Legally competent
- Age 40+
- No ACP on file

CCI Goals of the Project

- Improve conversations with members
- Use of pilot materials
- Capture consistent quality measures
- Devote key organizational resources
- Incorporate Five Promises of ACP
- Define ACP Process Flow
Overview

- One urban county, one rural county
- Six ACP Specialists / Facilitators trained
- Developed process flow, EMR note, document storage process and tracking spreadsheets, referral form
- Members sent letter with overview of project
- ACP Specialist followed up by phone to schedule meetings
- ACP Specialist assisted in completion of plans
- Meetings in member homes
Success

Jack’s Story

Success

Lenny’s Story
Challenges

- Impaired cognitive abilities of members and mental health issues
- Unfamiliar staff and trust issues
- Juggling schedules and workload
- Many members did not have agents
- Coordinating second witness
- Time commitment (meeting time, travel, follow up, and scheduling)

CCI Honoring Choices Pilot
Waukesha and Waupaca Counties
Total Time Spent by CCI ACP Specialists

<table>
<thead>
<tr>
<th>Month</th>
<th>ACPS Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mar</td>
<td>33.5</td>
</tr>
<tr>
<td>April</td>
<td>45.05</td>
</tr>
<tr>
<td>May</td>
<td>49.65</td>
</tr>
<tr>
<td>June</td>
<td>31.25</td>
</tr>
<tr>
<td>July</td>
<td>17</td>
</tr>
<tr>
<td>Aug</td>
<td>44</td>
</tr>
<tr>
<td>Total</td>
<td>220.45</td>
</tr>
</tbody>
</table>
Changes

- Added tracking of time spent calling and inviting members
- Added tracking of total time spent by ACP Specialists related to pilot to assess FTE needs
- Added a question about if printed materials were helpful to surveys
- Created talking points specific for DD/ID population
- Created special ID badge for ACP Specialists

CCI Honoring Choices Pilot
Waukesha and Waupaca Counties
March - August 2013 Data

<table>
<thead>
<tr>
<th>Honoring Choices ACP Pilot</th>
<th>March 2013 – August 20</th>
<th>Current Outcomes %</th>
<th>Wisconsin Medical Society Project Outcome Goal:</th>
</tr>
</thead>
<tbody>
<tr>
<td># People invited to Participate in Advance Care Planning</td>
<td>162</td>
<td></td>
<td></td>
</tr>
<tr>
<td># Scheduled Facilitations</td>
<td>108</td>
<td>66%</td>
<td>&gt;50%</td>
</tr>
<tr>
<td># Documented ACP Discussions in MR</td>
<td>123</td>
<td>114%</td>
<td>100%</td>
</tr>
<tr>
<td># People who Participated in ACP</td>
<td>88</td>
<td></td>
<td></td>
</tr>
<tr>
<td># People who completed written plan</td>
<td>46</td>
<td>52%</td>
<td>&gt;50%</td>
</tr>
</tbody>
</table>
CCI Honoring Choices Pilot
Waukesha and Waupaca Counties
March - August 2013 Survey Responses

<table>
<thead>
<tr>
<th>Honoring Choices ACP Pilot CCI Waukesha and Waupaca Survey Data</th>
<th>March 2013 – August 2013</th>
</tr>
</thead>
<tbody>
<tr>
<td># Participants who Rated ACP Discussion Helpful</td>
<td>100%</td>
</tr>
<tr>
<td>(Goal: &gt;3 on 5 Point Scale)</td>
<td>n=34</td>
</tr>
<tr>
<td># Participants who Rated Printed Materials as helpful</td>
<td>100%</td>
</tr>
<tr>
<td>(Goal: &gt;3 on 5 Point Scale)</td>
<td>n=34</td>
</tr>
<tr>
<td># Agents who feel more prepared</td>
<td>100%</td>
</tr>
<tr>
<td>(Goal: &gt;3 on 5 Point Scale)</td>
<td>n=19</td>
</tr>
<tr>
<td># ACP Specialists who felt members easily understood Instructions</td>
<td>100%</td>
</tr>
<tr>
<td>(Goal: &gt;3 on 5 Point Scale)</td>
<td>n=41</td>
</tr>
</tbody>
</table>

Lessons Learned
- Pilot embraced by leaders, staff, and members
- An overview improved process in pilot counties
- Organization of ACP Specialists is key
- Value of thorough and timely documentation
- Value of being focused and “present” for the ACP meeting.
- Confident conversations
Next Steps

- Continue training with Waupaca and Waukesha teams so they are fully operational
- Develop expansion plan for agency wide training
- Outreach to CCI staff and community