

# Bay Aging-Hampton VAMC Veteran Directed Care Veteran Handbook

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This handbook will help you to use the Veteran Directed Care program. The program is available to you through a partnership program with Bay Aging and the Hampton VA Medical Center. This handbook includes a lot of information about how the program runs that you can refer to throughout your time in the program. It also explains who is available to support you in this program. Veteran-directed does not mean doing things all by yourself — people are available to support you along the way. There is a section that talks about who does what. There are ideas and tips for when you develop your own spending plan. It also explains youights and responsibilities in the Veteran Directed Care program. Please think carefully about the information in this handbook. With the Veteran Directed Care program, choice and flexibility come with responsibilities. This document is business proprietary property and is protected by a Non-Disclosure Agreement.

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## What is Veteran Directed Care?

Veteran Directed Care offers a new Veteran-directed approach to home and community-based services. The Veteran Directed Care Program is designed to provide you with more choice and control in directing your services and supports.

| <i>Important contacts and number</i>     |                                       |                           |
|------------------------------------------|---------------------------------------|---------------------------|
| Name                                     | Job                                   | Phone number              |
| 1. Jennifer Beck                         | Community Living Director             | (804) 493-0238 ext. 1409  |
| 2. Justine Coates                        | Community Living Assistant            | (804) 493-0238 ext. 1411  |
| 3. Melissa Blake                         | VDC Director                          | (804) 758-2386 ext. 1219  |
| 4. Brianna Noel                          | Enrollment Manager                    | (804) 758-2386 ext. 1243  |
| 5. <del>Alex Baughan</del> Robert Dublin | Budgets, Invoices, Timesheets Manager | (804) 758-2386 ext. 1254  |
| 6. Tamara Wright                         | Customer Service Manager              | (804) 758-2386 ext. 1231  |
| 7. Christina Rinaldi                     | Billing Manager                       | (804) 758-2386 ext. 1242  |
| 8. Eduvigis Woods                        | VDC Coordinator, Hampton VAMC         | (757) 722-9961 ext. 13242 |

## What does Veteran-Directed Mean?

In the Veteran Directed Care program, Veteran-directed means you decide:

- What services, supports and goods you need
- When the services and supports are provided
- Who provides those services and supports
- Where the services and supports are provided
- How the services and supports are provided

Veteran-directed means you have more:

- Choice
- Control
- Flexibility
- Freedom

With Veteran-directed, you:

- Are in control of your life and how you live it
- Can get support with what you need in the way you need it
- Make choices about your services and supports
- Hire the people you want to provide your services and supports

Veteran-directed also means:

- Money gets approved for you to use to hire workers and buy supports and goods
- You work with Bay Aging staff to create a spending plan for that money
- You are responsible for following the Veteran Directed Care rules

## **My Responsibilities**

As a Veteran Directed Care participant, some of your responsibilities will be to:

- Assist with establishing your Veteran Directed Care eligibility through the Hampton Veterans Affairs Medical Center
- Develop a Spending Plan
- Follow your Spending Plan
- Let someone know if you need help
- Work with your Options Counselor
- Work with your Financial Management Services (FMS) provider, Bay Aging
- Arrange to get the services, supports and goods you need and pay for them according to your spending plan
- Hire and manage the people who will provide services and supports, which may include replacing them if they are not working out for you.
- Keep records
- Follow the Veteran Directed Care guidelines
- Be accountable for the use of Veteran Directed Care funds

## **Do I have to do this by MYSELF?**

You do not have to do this by yourself. The Options Counselor and Bay Aging can help you. If you want to be in the program but do not want to manage the hiring and your budget, you can appoint a Representative to do those things on your behalf. You may choose someone you trust, such as a member of your family, one of your friends, or someone else who has helped you before.

## **Options Counselor**

Everyone who participates in the Veteran Directed Care Program will have an Options Counselor. Your Options Counselor is available to help you:

- Understand the Veteran Directed Care Program

- Assess your needs and think through your goals for the program
- Develop your Spending Plan
- Evaluate your Spending Plan, and how Veteran Directed Care is working for you
- Understand and complete the paperwork
- Solve problems that come up

In working with your Options Counselor, you are responsible for sharing what is important to you and deciding what direction you want your life to go.

**In working with your Options Counselor, here are some questions to think about asking:**

- What days and times are you available to meet with me?
- Can you come to me when and where I need you?
- Are you located on a bus route and can I get to you easily?
- Is your location accessible?
- How soon could we meet to get started?
- Can you help me do the paperwork?
- How familiar are you with community resources?

### **Financial Management Services**

Bay Aging is the Financial Management Services (FMS) provider for Veterans participating in the Veteran Directed Care Program. Bay Aging will provide all FMS for Veteran Directed Care participants.

Bay Aging will:

- Assist you or your representative in completing the paperwork necessary for you to be an authorized employer and for Bay Aging to serve as your agent with the federal/state agencies
- Act as your payroll agent and take care of all money issues like timesheets, payroll, taxes and other employer-related requirements
- Process Employee Payroll and issue payment to workers through direct deposit
- Pay all payroll taxes to the government on behalf of the participant for the employee (FICA, etc...)
- Maintain all financial records (timecards, payroll, etc.)
- Issue W2 to your employees for tax purposes
- Complete your employee's Background check
- Send you a regular budget report through Participant Dashboard
- Contact you and your Options Counselor if you request something that is not approved in your plan and budget
- Assure that you pay only for those expenses that you have funds in your budget to cover
- Answer questions you and the people you hire may have about payroll matters

**Everyone who self-directs in the Veteran Directed Care Program must use Bay Aging.**

## **My Spending Plan**

### **Why do I need a spending plan?**

Your spending plan describes the services, supports and goods you need to live in the community the way you want. The plan lists the services, supports, and goods you need, who will provide them, and the amount of money you plan to spend. The spending plan will also help the VAMC understand why you need the services, supports, and goods you chose, and what the plan will cost.

### **How much money will be available for services, supports and goods?**

The amount of funding available for you will be determined by the VA based upon the level of care required. Your Options Counselor will have this information and will be able to tell you how much money you have to spend. You may use this money to buy what you need to live in the community.

## **Making My Spending Plan**

Veteran Directed Care allows YOU to decide, within some program rules, what services, supports and goods will best meet your community living needs. Spend some time thinking about what is most important to you. This information will help you when you write your plan and budget.

### **In making my Spending Plan, how should I start?**

- Contact your Options Counselor to set up a planning meeting.
- Your Options Counselor will have some worksheets to help you figure out and list what is important to you, what services and supports you need, how much these services and supports will cost and what you want to spend.
- Think about what you would like your life to be like and what services, supports and goods would improve your life. What skills would you like to improve? How would you like to spend your time? Who would you like to spend time with? Think about why these changes would make your life better.
- Think about who might help you make these things happen.
- Write your plan with the help of your Options Counselor and anyone else you might want to help you, including family and friends.

### **What should my Spending Plan include and how will I get what I need?**

You will receive an amount of available funding that you will use to develop your Spending Plan for the entire year. It is required that you break the budget down into monthly amounts to help you plan how you will meet your needs throughout the year. In making your plan and budget,

think about:

- The services, supports and goods you will need each month, and those services, supports and goods you may need once during the year or just a few times.
- The types of workers you need to hire to provide the services and supports.
- The types of goods you may need.
- How often you will get the services, supports and goods.
- The amount of money you have and how much money will be needed to pay for the services, supports and goods.
- How you will decide if your plan is working for you.

Please keep in mind that administrative fees for Veteran Directed Care are reimbursed through your budget. Administrative fees include costs associated with the Options Counselor assessment and your Financial Management Services. Your Options Counselor will provide you with the exact amount of these fees.

### **Are there specific plan and budget approval guidelines?**

When developing your spending plan, you must follow the approval guidelines. Your Options Counselor will help you interpret the guidelines and explain how they affect your plan and budget.

The services, supports and goods that you choose must:

- Help you meet your functional, medical and/or social needs;
- Help you to reach the goals you may have set for yourself;
- Not be prohibited by federal and state laws and regulations;
- **Not be available through another VA source AND**
- Do one or more of the following:
  - Make it easier for you to do things that are hard because of your disability or health issues;
  - Increase your safety in your home environment;
  - And/or lessen your need for other publicly funded services.

If you have a change in health or social needs or a short hospitalization with change in health baseline, another assessment may be completed. **If you are hospitalized for more than 15 days, the VA will suspend you from Veteran Directed Care and you may need a new assessment in order to be re-enrolled in Veteran Directed Care.** With appropriate justification, approval, and availability of funds, you may be able to receive more funding, should your needs require it. But, for the most part, the amount of funding available to you for the month will not change, so you have to be careful to plan for how you will meet your needs for the whole year.

**What services, supports, and goods I choose to buy? (These items must be pre-approved and authorized by the VA in advance).**

**Here are some examples of services, supports, and goods you might purchase through the Veteran Directed Care Program:**

- Adult Day Care
- Attendant Services
- Caregiver Education and Training
- Caregiver Support Coordination
- Chore Maintenance
- Electronic Monitoring
- Environmental Services
- Health Maintenance
- Homemaking and Personal Care
- Individually Identified Services Necessary for Independent Living
- Individually Identified Goods Necessary for Independent Living
- Information and Referral Services
- In-Home Respite Care
- Medication Management
- Nutritional Services
- Safety Services
- Shopping or Running Errands
- Socialization Support Services
- Transportation

**Services, supports and goods NOT COVERED in the Veteran Directed Care Program**

Veteran Directed Care will not cover institutional care, nursing respite, or your room and board.

Some other purchases that are not allowable through Veteran Directed Care are

- Services already being provided to a Veteran or their family caregiver(s) by or through the Department of Veterans Affairs
- Services, supports or goods provided to or benefiting persons other than you
- Room and board, including rent and mortgage payments
- Personal items and services not related to your disability

- Experimental treatments
- Vacation expenses (except for the cost of the services you may need while you are on vacation)
- Please see Appendix E for a more detailed list of unallowable expenditures

## **Special Purchases**

In making your Spending Plan, keep in mind that your monthly available funding must cover your needs for a whole month. This includes purchases of any special, higher-cost items you might need.

## **Submitting my plan and budget for approval**

Your plan and budget must be approved by the VA before services under the Veteran Directed Care Program begins. Once your spending plan has been approved, copies will be given to you, your Options Counselor, and Bay Aging financial management services staff.

While you are waiting for the approval of your plan and budget, you can begin to work on getting the services, supports and goods in your plan and budget. However, you cannot actually hire someone and begin services until your plan and budget are approved.

## **Making it Happen: Arranging for Services, Supports, and Goods**

### **Becoming an Employer**

Before you can hire staff, you will need to become a legal employer. Bay Aging will help you complete and file the necessary paperwork to become an employer. If you are using a representative to support you in Veteran direction, the representative will become the legal employer and will be required to complete a criminal background search.

### **Hiring Workers**

You may hire your own service workers, a family member, or a friend. Here are some things to think about when hiring:

- What do I need the service provider to do?
- How do I want it done?
- How often do I want help? Part-time or full-time?
- What time of day do I want help?
- Do I want help on the weekends and/or during the week?
- Does the person who helps me need to be strong?
- Does the person who helps me need to be able to drive?

- Does the person who helps me need to have his or her own car?
- Do I need more than one person to help me?
- Do I need different people to help me with different things?
- What do I want the people who help me to know about me?
- Do I want the people who help me to be friends, neighbors, family members or I rather used someone I don't know outside of their caring for me?
- Would the person I want most to help me be the best person for the job?
- How much am I willing to pay for the help I need?

**Once you know what type of service provider you want to help you, you will need to find that someone to do the job.**

### How to Locate Workers

You may have family and friends who you already know want to work for you. If you do not, you can put the word out through your family, friends, church or other networks that you are looking for help. These informal ways are often the best way to locate workers who are right for you.

If you cannot find the help you need through those places, however, you may want to place an advertisement. You may have to place an ad in a newspaper or online, or on a bulletin board to find help. Check ads in each of those places to see what they are like and how much they cost. The cost of an ad may be included in your plan and budget if you so wish.

Make sure you include important information in your ad like:

- What hours you want someone to work
- A general description of what you want them to do
- How to contact you or your contact person
- Any qualifications you may require the person to possess

You need to be careful about the type of information you put in the ad. Do not include your address or that you live alone.

As with other parts of Veteran Directed Care, your Options Counselor can help you if you have questions about the interviewing and hiring process.

## Interviewing

### The Telephone Screening

You need to be careful that anyone you hire will treat you the way you want to be treated. One way to do this is to talk with them over the phone before you meet them.

- Ask questions: name, address, phone number and how they would get to work

- Talk about the job duties, and then ask about things that might be hard for them, like lifting or personal care
- Ask about their experience in working with people who have disabilities
- Make sure they provide references
- Thank them for calling, and tell them you will call them back if you want to interview them in person

### **The Face-to-Face Interview**

Think about where you want to do the interview — at home or some other place nearby. It is often a good idea to do the first interview in a public place other than your home like a neighborhood coffee shop. If that is not a good option for you, it is also a good idea to have someone else there during the first interview. If you interview someone, you might want to do some of the following:

- Take notes during the interview, or have someone there to help you remember what is said
- Introduce yourself
- Tell them about the job and what you want them to do
- Give them an application and ask them to fill it out
- Ask about how they will get to work
- Talk about when you need help
- Ask them about their work experience and how they feel about providing you the care you need
- Talk about Veteran Directed Care and how Bay Aging will be processing their payroll and ensuring that their payroll taxes are handled
- Talk about what the job pays
- Ask them why they want to work with you
- Ask them why they think they would be good at working with you
- Tell them you are required to do a criminal background check and ask for proof of citizenship/legal resident status
- Ask them for references
- Thank them and tell them you will call when you make your decision
- Once the interview is over, you will need to check their references.

Bay Aging will complete a sex offender/criminal history search for you, if you want a more complete background check it could be put into your budget. Employees will not be approved to start work until criminal history results have been received. If barrier crimes are identified in the employee's criminal history, the employer is notified that the employee is not eligible to participate in the VDC program unless extenuating circumstances are identified and approval is granted by the VA. Completion of a Risk Negotiation Agreement and Acceptance of Responsibility for Employment form will also be required. If non-barrier crimes are identified,

the Veteran/representative-employer has the option to terminate the employee or sign a waiver to continue employment which releases Bay Aging from all liability associated with continued employment of the employee.

### **How to Check References**

To check references, call the people listed as references and ask about the applicant. Some good questions are:

- What are the applicant's strengths?
- What are the applicant's weaknesses?
- Would they recommend the applicant to work with you?
- Do they show up on time?
- Do they do the job required?
- Do they show up regularly?
- Do they call when they will be late, or may not be able to work?
- Do they bring personal problems on the job?
- Do they drink or do drugs on the job, or come to work impaired?
- If you had the opportunity, would you hire this individual again?
- Ask questions about the qualities you want in someone. For example, is the applicant honest? Does the person respect other people?

Now that you have learned about the applicant, make the best decision you can about whether the applicant is right for you. Call and let the individual know you want to hire him/her for the job and restate what the job pays. You should also call the person and tell them if you have chosen not to hire them. If the person accepts the job, meet with the employee to provide them an orientation, fill out the necessary forms for the employee, and decide on a starting date. Your Options Counselor will forward the required documents to Bay Aging to start payroll and tax requirements.

### **Purchasing goods and services**

Some of what you may want to spend your budget on might be things that would make it easier for you and mean that you would need less help from others. For example, a laptop might help facilitate a timely submission of time sheets for your employees.

Review the list of categories in this guidebook for examples.

When you buy something other than hiring someone to help you, you need to:

- Contact your Options Counselor with the item and price of what you wish to purchase.

Your Options Counselor will submit a memo to the VA requesting approval to use the VDC budget to make this purchase. **All items using the VDC budget must be pre-approved by the VAMC before purchasing. This includes warranties or accessories that may be necessary.**

- Once approved by the VAMC, make the purchase of approved items only
- Get an invoice, which is a written document showing how much the service or item costs, including tax and delivery or setup fees, if they apply
- Find out if the business will accept a check from Bay Aging
- Send the invoice and a completed VDC Vendor Purchase Checklist to your Options Counselor by the 15<sup>th</sup> of the month following the date of purchase to request payment from Bay Aging.
- Any good or service you want to purchase will need to be in your Spending Plan so that Bay Aging knows that it is an approved item

### **How to make sure my plan is working the way I want**

Once you use the services and supports in your plan, how do you make sure they are really helping you? Only you will really know if something needs to change. You might want to ask yourself questions like:

- Am I making progress toward the goals I set when I wrote my spending plan?
- Does the person I hired do what we agreed he/she would do?
- Am I happier now?
- Do I spend more time doing the things I am good at and enjoy?
- Do I spend time with the people I care about and like?
- How could my life be better?

If you want to talk with someone about these questions, think about asking your family, friends or others you trust. You can also contact your Options Counselor to talk these things over.

### **How to change my approved plan and budget**

When you want to make any changes in your plan or budget, you must contact your Options Counselor first to discuss the change and, if necessary, get approval. Depending on the change(s) you want to make, you may have to amend your Spending Plan and get them approved. Here are the rules for making changes:

#### **You DO have to amend your plan and budget and ask for another approval if:**

- You want to make a big change, such as spending more on a service or item. You will have to revise your plan and budget and have them approved, because the change(s) mean(s)

that you will have to spend less on something else.

- You want to add a new need to the plan and buy a new service or good. Again, remember when you add a new service or good, you will have less to spend somewhere else, and you will have to adjust your spending.

**You DO NOT have to amend your plan and budget and ask for another approval if:**

- You want to increase or decrease slightly the amounts you spend on the approved purchases.
- You have unexpected assistance and will be spending less than you planned that month for a service or support.
- You want to redistribute your workers' hours among your workers (when you have more than one worker) while keeping the total number of hours the same.
- You want to change a purchase from an approved service or good to an alternate service or good that could address your needs in a similar or better way with little change in your approved budget.

**Remember, when you want to make any change in your plan and budget, you must contact your Options Counselor first to discuss the change and, if necessary, get approval.**

### **Annual plan and budget review**

**In the first year you are in the Veteran Directed Care Program, after six months, you will be reassessed to make sure that your Spending Plan is meeting your needs. After that, you will be reassessed every year both to keep your Spending Plan up to date and to renew your Veteran Directed Care eligibility. Each authorization is for a period of 365 days. Services will be discontinued if a renewal authorization is not received from the VA Medical Center prior to the authorization expiration date.** You can also review the plan and budget more often, if needed. When you review your plan and budget, you may want to make changes, especially if your needs have changed. Contact your Options Counselor and follow the guidelines described in the previous section for making changes in your approved plan and budget.

### **Health and Safety**

The Hampton Veterans Affairs Medical Center and the Veteran Directed Care Program wants to make sure that you are receiving the services and support you need in Veteran Directed Care to live successfully at home and in the community. Officials from Veteran Directed Care and the Hampton Veterans Affairs Medical Center will look at the program to make sure Veteran Directed Care policies and directives are being followed and that Veteran Directed Care participants are receiving the services and supports they need.

If you suspect abuse, neglect or exploitation, please call **Adult Protective Services at (888) 832-3858**.

### **What if Veteran Directed Care isn't working for me?**

If you decide that the Veteran Directed Care Program is not working for you, you can dis-enroll from Veteran Directed Care and instead return to services through other VA programs. Contact your Options Counselor to arrange a plan for this if you want.

Also, you will be required to leave the program if:

- you are not performing your role as an employer successfully and cannot locate a representative to act on your behalf
- you have misused your funds
- you are not able to maintain your health or stay safe
- Any type of physical, sexual, or verbal misconduct or threatening behavior/hostile environment will be considered an episode of non-compliance and may be grounds for disenrollment from the program based on zero tolerance of these types of behavior.

If any of these things are happening, your Options Counselor will make every effort to talk to you about them and give you a chance to correct any problems. If that does not work, however, your Options Counselor will tell you by mail and, if possible, directly by telephone or face-to-face that you are being required to leave the program. The Options Counselor will work with you and Hampton Veterans Affairs Medical Center to arrange for you to transition to other services.

## **Appendices**

### **Glossary of Terms**

**Adult Day Care:** Daytime care of any part of the day, less than 24-hour care. The program provides a structured, comprehensive program that is designed to meet the needs of adults with functional impairments through an individual plan of care by providing health, social, and related support services in a protective setting other than the Veteran's home.

**Bay Aging:** The local Aging and Disability Network agency holds a contract with the Department of Veterans Affairs, hires individual Options Counselors, and trains these Options Counselors to work at the local level and provide supports to individual Veteran Directed Care Veterans. It also contracts with Bay Aging to provide financial management services support to Veterans.

**Budget:** The amount of available funding for each individual participant. It is based on the

Veteran's needs. The Options Counselor receives the individual budget from the VA and informs the participant when he/she is deciding whether to select Veteran Directed Care over traditional VA services and during the planning process. Any requests for adjustments to the budget, based on a change in the Veteran participant's needs, are initiated by the participant through his/her Options Counselor.

**Caregiver Education and Training:** Access to a resource library, informational resources, support groups, seminars and focus groups, individual or group counseling, and education services to caregivers of Veterans.

**Caregiver Support Coordination:** Caregivers of Veterans often give more hours than they are paid for in additional service to the Veteran. Caregiver support coordination begins with comprehensive caregiver assessments through home or office visits and phone follow up. A plan of care is created based on the assessment and staff assist in coordinating necessary care and services to include caregiver trainings and support groups to help support caregivers in their roles. This may also include individual or group counseling services to assist caregivers with problem solving and emotional support.

**Chore Maintenance:** Initial and/or periodic heavy cleaning chores. Chore Maintenance allows a heavy-duty level of cleaning to get the home into a healthy environment for the Veteran. This may include removal of trash and debris from the home, heavy cleaning (scrubbing floors, washings walls, washing outside windows) moving heavy furniture, yard clean-up, and walk maintenance and repair.

**Consumer Direction, Self-Direction, or Participant Direction:** An approach to Long-Term Services and Supports that emphasizes the ability of older persons, persons with disabilities and, with the Veteran's approval, their families or representatives, to decide about their own needs and make choices about what services would best meet those needs. Consumer direction, self-direction, and participant direction are sometimes used interchangeably.

**Electronic Monitoring:** Room monitors to enable remote monitoring of the Veteran. These may include motion monitors, and other monitor services not otherwise covered by VA or other insurance programs.

**Health Maintenance:** The provision of services and assistive devices which will prevent, alleviate,

and/or cure the onset of acute or chronic illness, increase awareness of special health needs, and/or improve the emotional well-being of the Veteran. This may include the cost of a caregiver to escort the Veteran to facilitate participation as needed. Some health maintenance services include the following:

- Continued health maintenance and monitoring not available through insurance or Veteran's benefits
- Cooking classes for caregiver
- Gym or Health Club membership
- Health Counseling
- Health Education
- Massage therapy beyond services traditionally covered by insurance
- Health maintenance programs such as water exercise classes or cardio-aerobic exercise classes
- Structured weight reduction programs

**Homemaking Services:** These include but are not limited to: laundry, sweeping and mopping floors, dusting, changing linens, cleaning the bathroom (toilet tubs/showers, sinks & floors), cleaning the kitchen (loading/unloading dishwasher, hand washing dishes, washing off countertops, sinks, floors, and stovetops as needed). This may also include the preparation of meals, home management, and/or escort services.

**Individually Identified Services or Goods Necessary for Independent Living:** These services and goods are not covered by traditional VA or other resources but are deemed to be necessary for the Veteran to remain independent with the best quality of life as defined by the Veteran.

**Nutritional Services:** Can include but is not limited to meal service, therapeutic meals, dietary education specified by your physician. For more specific details and options please contact your Options Counselor. These services may include *Home Delivered Meals*: Home-delivered nutrition services must deliver at least one hot, cold, frozen, dried, canned, or supplemental foods meal per day and may provide additional meals to an eligible individual who is homebound by reason of illness, incapacitating disability or is otherwise isolated.

**Options Counselor:** A trained individual who assists individual Veteran Directed Care Veterans with understanding the Veteran Directed Care Program requirements, developing a service and support plan and budget, and identifying where or how the developed service and support plan

and budget can be implemented. The Options Counselor also serves as the liaison between the Veteran and other Veteran Directed Care staff.

**Personal Care Services:** These are service tasks provided directly for the Veteran's person and include assistance with Activities of Daily Living such as bathing, dressing, feeding, or mobility. It may also include providing verbal prompts to taking medication or physically guiding the Veteran to take them.

**Respite Care:** Respite care provides short term breaks that relieve stress, restore energy, and promote balance in caregivers of the Veteran.

**Safety Services:** These may include a Personal Emergency Response System or a combination key box for the door (keeps a key available for easy access to the home by emergency personnel). Safety Services may include a home safety evaluation by a professional person to assure safety of travel paths and needed durable medical equipment that may create a safer environment for the Veteran.

**Self-Determination:** A broad concept that means Veteran participants have overall control of their lives and ability to take part in society. The Veteran has the ability to succeed or fail on his/her own decisions. Self-determination rests on five basic principles: 1) freedom to lead a meaningful life in the community; 2) authority over dollars needed for support; 3) support to organize resources in ways that are life-enhancing and meaningful; 4) responsibility for the wise use of public dollars; and 5) confirmation of the important leadership that Veteran participants have in developing their plan of care.

**Shopping or Running Errands:** Shopping with or without the Veteran. If the caregiver uses the Veteran's private vehicle, no mileage is paid. If the caregiver uses their own private vehicle for travel, mileage and travel may be reimbursed as agreed upon with the Veteran.

**Socialization Support Services:** Caregiver to accompany the Veteran to activities such as education or exercise classes, support groups, movies, or other social engagements as indicated by the Veteran. Counseling and support advisory counseling is provided that is beyond services traditionally reimbursed by VA or other insurances.

**Spending Plan:** A Veteran's plan that contains the services that the Veteran chooses: it includes

the service(s)'s projected cost, frequency and duration; and the type of provider who furnishes each service. The plan may also include other services and informal supports that complement purchased services in meeting the participant's needs. The spending plan includes a budget worksheet and a plan of care developed by the Veteran and/or designated Representative and the Options Counselor.

**Transportation:** Specialized transport required to go to socialization support or medical support activities with the designated caregiver may be reimbursed as agreed upon with the Veteran. Provision of transportation assistance may include an escort to a Veteran who has special needs (physical or cognitive) when using regular vehicular transportation.

## Frequently Asked Questions

### How can Veterans qualify for the Veteran Directed Care Program?

All Veterans enrolled in the VA Health System and who are determined to be “in need of nursing home care” as defined by the VA are eligible to participate in the Veteran Directed Care Program. The Veteran must state an interest in consumer directed care.

### Who is the leader in the Veteran Directed Care Program?

The Veteran is the leader. He/she decides if family members or any other persons should be involved.

### What services are included?

The participant decides what services he/she needs. This means the participant may choose to buy any services, supports or goods if those services, supports or goods:

- Help the Veteran to meet his/her functional, medical and/or social needs and live life successfully;
- Help the Veteran to reach the goals he/she has set for himself/herself;
- Are not prohibited by Federal and State laws and regulations;
- Are not available through another source; and
- Do one or more of the following:
  - The service or item would make it easier for the Veteran to do things that are hard because of his/her disability;
  - The service or item would increase the Veteran’s safety in his/her home environment; and/or
  - The service or item would lessen the Veteran’s need for VA or other publicly funded services.

### How much funding is available for services and who decides how it will be spent?

The amount of funding available for you will be determined by the VA and is based on your level of need. Your Options Counselor will have this information and will be able to tell you how much money you have to spend.

### Who can help the Veteran develop a spending plan?

The Veteran decides what services he/she needs and develops a spending plan with the assistance of the Options Counselor and anyone else the Veteran participant wants to be involved, such as a family member or trusted friend.

### **Who hires the service workers and decides what to pay them? Who pays the workers?**

The Veteran decides what workers to hire. The minimum pay rate will be the state minimum wage. The worker will be reimbursed for mileage when transporting the Veteran to and from medical/dental appointments at the Federal Rate when using their cars if the veteran has agreed to the reimbursement and included it in the spending plan.

Bay Aging will pay the workers based on the approved budget and will handle other employer responsibilities for the participant.

### **Who can help the Veteran with implementing the approved plan and budget?**

The Veteran's Options Counselor can help to implement the approved Service and Support Plan. The FMS, (Bay Aging), will help implement the approved budget by paying the Veteran's workers and keeping track of expense.

### **How much flexibility and control will the Veteran have about services?**

The Veteran directs his/her services. The Veteran will have flexibility and control, within program rules, over the types of services and supports they purchase, who will provide the services, where and when those services and supports will be received, and how much the workers are paid.

### **What learning and training activities are included?**

The Veteran will receive information about the Veteran Directed Care Program and how it works from multiple sources: his/her Options Counselor, one-on-one learning and peer support. Individuals may also study on their own, using the Veteran Directed Care Veteran Handbook, worksheets and other materials. The Veteran may use his or her funds to train workers and to purchase support services that improve his or her ability to manage his or her disability.

## **Veteran Directed Care (VDC) Program Criteria for Allowable**

Expenditures to Be Considered in Conjunction with State Rules

### **VDC Goods and Services: Introduction**

This guide provides VA Medical Center (VAMC) VDC Coordinators with criteria and an allowable list of goods and services to assist with reviewing and approving VDC spending plans. To use this guide, VAMCs should begin by applying the criteria in the first section to any good or service listed in the Veteran's VDC spending plan. If all criteria are met, VAMCs should align the good or service with the category of allowable goods and services in the final section.

If the good or service listed on the Veteran's VDC spending plan: (1) meets all eight criteria; and (2) fits into at least one category of allowable good or service, the VAMC can approve the good or service.

### **VDC Goods and Services: Criteria**

Expenditures on goods and services should meet all the following criteria:

1. Meets the identified needs, goals and outcomes in the Veteran's spending plan; AND
2. Improves the Veteran's ability to remain safely in their home; AND
3. Addresses activities of daily living or instrumental activities of daily living needs of the Veteran; AND
4. Be the least costly alternative that reasonably meets the Veteran's identified needs; AND
5. Not be provided or paid for by VA, Medicare, Medicaid, TRICARE, or other agency, organization, program, service, or insurance; AND<sup>1</sup>
6. Not be the responsibility of the homeowner to maintain, repair, or replace; AND
7. Must meet one or more of the following goals:
  - a. Enhance community inclusion and support the Veteran's ability to remain in their home and access their community resources and network;
  - b. Increase the Veteran's independence;
  - c. Develop, maintain, or improve personal, social, physical, and/or work-related skills;

<sup>1</sup>The Veteran can elect to use VDC funds on a good or service if the timeliness, style, make, or brand that best meets their needs is not available through another source. The VDC spending plan should specifically document how the timeliness, style, make, or brand of the good or service increases the level of independence for the Veteran more than what would be provided by another source.

- d. Decrease dependency on formal support services (i.e. reduce the need for human assistance);
- e. Increase the Veteran's safety in their home and community; and/or
- f. Enhance family involvement by increasing the ability of direct care workers and caregivers including family members and friends to receive education and skills training needed to provide support to the Veteran.

AND;

8. Be for the Veteran.

### **VDC Goods and Services: Allowable List Allowable Goods and Services include:**

- Personal Care Services, which may include direct care workers, adult day health care,

respite care<sup>2</sup>, and home care agency services<sup>3</sup>;

- Cleaning services from firms or individuals to clean the Veteran's personal areas including bedroom, bathroom, kitchen, etc.;
- Food preparation service and delivery of prepared foods (not payment for the food itself);
- Transportation services in support of the Veteran for attending health-related appointments and engaging in community activities;
- Laundry service from a laundromat or other provider;
- Small electric appliances that allow the Veteran to safely prepare meals (i.e., microwave oven);
- Limited yard maintenance when access to and from the Veteran's home and/or vehicle would be impeded due to a lack of maintenance.
- Snow removal in order to gain access to and from the Veteran's home and/or vehicle;
- The cost of changing locks at the Veteran's home, as necessary, when the Veteran's direct care worker ceases employment;
- Home modifications or medical equipment to include grab bars, lift chairs, and specialized beds;
- Personal care-related supplies, such as incontinence undergarments, compression socks, anti-sore cushions, and disposable bed pads;
- Expenses related to the development and implementation of the Veteran's spending plan, such as background checks for workers and worker's compensation insurance;
- Therapies and behavioral supports not otherwise available that mitigate the Veteran's disability when ordered by a VA primary care provider; • Home modifications or medical equipment to include grab bars, lift chairs, and specialized beds;
- Costs incurred related to the management of the Veteran's budget or responsibilities, such as devices to support telehealth, fax machines, printers, ink cartridges, and paper.

<sup>2</sup> VDC covers the in-home respite needs of Veterans. Veterans are still eligible for inpatient respite care.

<sup>3</sup> The use of home care agency services is restricted to certain situations. See Appendix A for more information.

## Appendix A. Use of Home Care Agencies in VDC

The use of home care agencies is limited to certain situations in VDC. Veterans that desire to receive the majority of their personal care services through agency care should be referred to the homemaker/home health aide (H/HHA) program. Below are situations in which the use of agency care is permissible in VDC.

1. For the first 90 days of the Veteran's enrollment in VDC as the Veteran recruits and trains self-directed workers.
  - a. VAMCs can also pay for H/HHA until the Veteran has recruited and trained self-directed workers and the VAMC approves the VDC spending plan.
2. As back-up and/or emergency care.
  - a. If possible, Veterans can use self-directed workers for back-up and/or emergency care as a first resort and reserve agency use for situations in which no self-directed workers are available.
3. Veterans can use agency services for a recurring but limited fashion in exceptional circumstances. For example, if a Veteran has two self-directed workers but neither worker is available during one weekday morning an agency can be approved to provide personal care services to the Veteran during that time.

## Unallowable Veteran Directed Care Expenditures

- Services provided to Veterans living in licensed foster care or other congregate residential settings
- Services covered by the Veterans Health Administration (VHA), Medicare, or other liable third parties including education, home-based schooling, and vocational services
- Services, goods, or supports provided to or benefitting persons other than the Veteran
- Any fees incurred by the Veteran such as medical fees and co-pays, attorney costs, or costs related to advocate agencies, with the exception of services provided as flexible case management
- Insurance except for insurance costs related to employee coverage

- Room and board and personal items that are not related to the disability
- Home modifications that add square footage
- Home modifications for a residence other than the primary residence of the Veteran
- Expenses for travel, lodging, or meals related to training the Veteran or his/her representative or paid or unpaid caregivers
- Experimental treatments
- All prescription and over-the-counter medications, compounds, and solutions, and related fees including premiums and co-payments
- Membership dues or costs except as related to fitness or physical exercise
- Vacation expenses other than the cost of direct services
- Vehicle maintenance (can cover maintenance to modifications related to the disability)
- Tickets and related costs to attend sporting or other recreational events
- Animals, including service animals, and their related costs

### **Grievance Policy and Procedures**

If you disagree with an action affecting your services or disenrollment from the Veteran Directed Care program, you may file a grievance. A formal grievance of disenrollment or service delivery must be sent by mail to Bay Aging, P.O. Box 610, Urbanna, VA 23175 or called into the Community Living Director at 804-493-0238. The grievance must be received by the Veteran Directed Care Program on or before 21 days following the action being grieved. You must include the reason of the grievance and any information supporting your position.

Upon receipt of the grievance, the Community Living Director will review the grievance, consider the decision and contact you to discuss the situation.

If a resolution cannot be reached with the Community Living Director, the issue will be forwarded to the Chief Executive Officer for final resolution.

If you have any questions about the process, please contact your Options Counselor or the Community Living Director.