



## Person-Centered Budget Algorithm (PCBA) Technical Advisory Group (TAG) Meeting #2 Notes

November 3, 2020

### 1. Meeting Overview

The November 3, 2020 Person-Centered Budget Algorithm (PCBA) Technical Advisory Group (TAG) meeting covered the following:

- Introductions
- Person-Centered Budget Algorithm (PCBA) Refresher
- New Assessment and Person-Centered Support Plan Overview
- PCBA Development and Update

The slide deck presented is available on the Colorado Department of Health Care Policy & Financing (Department) PCBA website:  
<https://www.colorado.gov/pacific/hcpf/person-centered-budget-algorithm-pcba>.

### 2. Key Feedback Themes

#### Person-Centered Budget Algorithm (PCBA) Refresher

- The Department should work to gather more consistent and complete data.
- Utilization data may not be fully capturing resource need and need to consider other ways to capture resource need in PCBA development and analysis.
- Training on administration of the new Long-Term Services and Supports (LTSS) Assessment needs to be thorough and consistent.
- The larger service authorization process needs to be person-centered.
- The Department should share specific ways they feel the PCBA is meeting the definition of “person-centered”.



- Implementation plan needs to be presented in plain language.
- The Department should work with stakeholders to get more attendees at Statewide Meetings.

#### New Assessment and Person-Centered Support Plan Overview

- Colorado should consider the implementation of budget neutral consumer direction in all waivers and services. A pilot should be considered.
- Stakeholders are interested in receiving Optumas contract deliverables.
- Effective implementation of the Care & Case Management System will be critical. Need to test the new Assessment and Support Planning process in the new system to ensure its accuracy.
- PCBA processes need to account for the fact that individuals' resource need can change. Cannot rely on an "exceptions process".
- The PCBA process should allow for expeditious review in case of emergencies and/or changed circumstances/needs.

#### PCBA Development and Update

- Items in the new Support Plan need to be included in the person-centered planning process.
- The PCBA should not be limited solely to Activities of Daily Living (ADLs) and Instrumental Activities of Daily Living (IADLs).
- The PCBA and related processes need to start with a focus on what individuals want for themselves and then also consider other factors. Processes should not be built primarily on ADL, IADL, medical, or behavioral needs.
- Adults and children will likely have different drivers of resource need.
- Individuals doing well because of the supports they currently receive should be considered in PCBA development and their needs appropriately captured to maintain supports.
- There are concerns about using raw utilization as an input to the model. Raw utilization does not always accurately reflect individuals' needs.



- Data need to be excellent to test and validate the PCBA.
- The sequencing of implementing the Assessment, Support Plan, Care & Case Management System and PCBA at the same time seems off. Need to have significantly more new assessments completed within the new system before we implement the PCBA.

### Additional Questions

- The Department and Optumas have addressed contextually appropriate questions on the CO PCBA website (<https://www.colorado.gov/pacific/hcpf/person-centered-budget-algorithm-pcba>). The FAQ includes questions received via the Google Meeting chat.

## 3. Action Items

- Continue exploring options to address data concerns.
- Explore the impact of consumer direction in relation to the budget tool.
- Investigate utilization versus level of need.
- Put together an outline of the plan around the exceptions process.
- Work to encourage attendance at Statewide Meeting II and other stakeholder meetings.
- Review the Clinical Hypothetical Study with the TAG.
- Post updated Frequently Asked Questions (FAQs) on website.

## 4. Next Steps

- Follow up questions or comments can be shared with the Department or Optumas.
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