



Cross Disability Advisory Council Meeting



August 21, 2025





AGENDA

- I. **Welcome Activities**
- II. **Assessment Tools / Level of Care**
 - a. Recap July Information
 - b. Discuss State Options
 - c. Review Examples of Assessment Tools
- III. **Overview of Two Subcommittees**
- IV. **Closing Activities**

What Are The Goals for Today's Meeting?

- ❖ **Information / Learning:** We want CDAC members to **understand:**
 - The basics of the Medicaid waiver application process
 - The role of assessment tools in the application process
 - The types of assessment tools states can use

- ❖ **Feedback:** We want CDAC's **input** on level of care and assessments:
 - Share your thoughts about ND's current waiver application processes
 - What do you think about national versus homegrown tools?
 - What do you think about single disability versus cross-disability tools?

- ❖ **Decision Preparation:** We want CDAC members to consider their **subcommittee preferences**. We will:
 - Share more about the work each group will do
 - Talk about the goals for the groups
 - Send out a survey to ask preferences after this meeting

CDAC's Role

1. Ask questions about what we are sharing. Speak up if something doesn't make sense!

2. Share your ideas about assessment tool options.

3. Think about which subcommittee you want to be on. There will be a survey to fill out after with your preferences.



Recap: Understanding the Waiver Assessment Process



Medicaid 101: What is a Medicaid Waiver?

Waivers are a type of custom Medicaid program. Waivers let states support specific groups of people and better meet their needs.

- States can choose to create Medicaid waivers. Waivers allow states to “waive” certain Medicaid rules. This means to not follow specific rules to do something different for their Medicaid program.
- Waivers help states create customized programs that better support specific populations. One example is a waiver for people with ID/DD.
- Waivers typically have higher participant income limits than the Medicaid State Plan. Kids qualify for Medicaid waivers based on their own eligibility and income. This is separate from any family eligibility.
- People who qualify for waivers automatically qualify for Medicaid State Plan services too.



Medicaid 101: What is a Medicaid **HCBS** Waiver?

HCBS waivers allow people to receive Medicaid services in their homes and communities instead of in institutions.

- Home and Community-Based (also called “HCBS”) waivers are a type of Medicaid waiver. HCBS waivers let states provide services in people’s homes. **This helps people stay in their communities.**
- HCBS waivers are the most common type of Medicaid waiver that states use.
- Almost every state has at least one HCBS waiver.
- Waivers cannot cost more than the services would cost in an institution, like a Nursing Facility. This is called “budget neutrality”
- Sometimes you will see HCBS waivers called 1915(c) waivers. 1915(c) is just the part of the Social Security Act that describes these waivers.



Medicaid 101: What HCBS Waivers Does ND Have Today?

North Dakota has five HCBS waivers today. CDAC's work will include three of these HCBS Waivers (outlined in blue).

Medically Fragile Children

Medically needy children 3-17

Traditional IID/DD

Children or adults with ID and DD

Autism Spectrum Disorder

Children with ASD under 18

Children's Hospice

Children with a life limiting medical diagnosis under 22

HCBS Waiver

Older adults and adults with physical disabilities

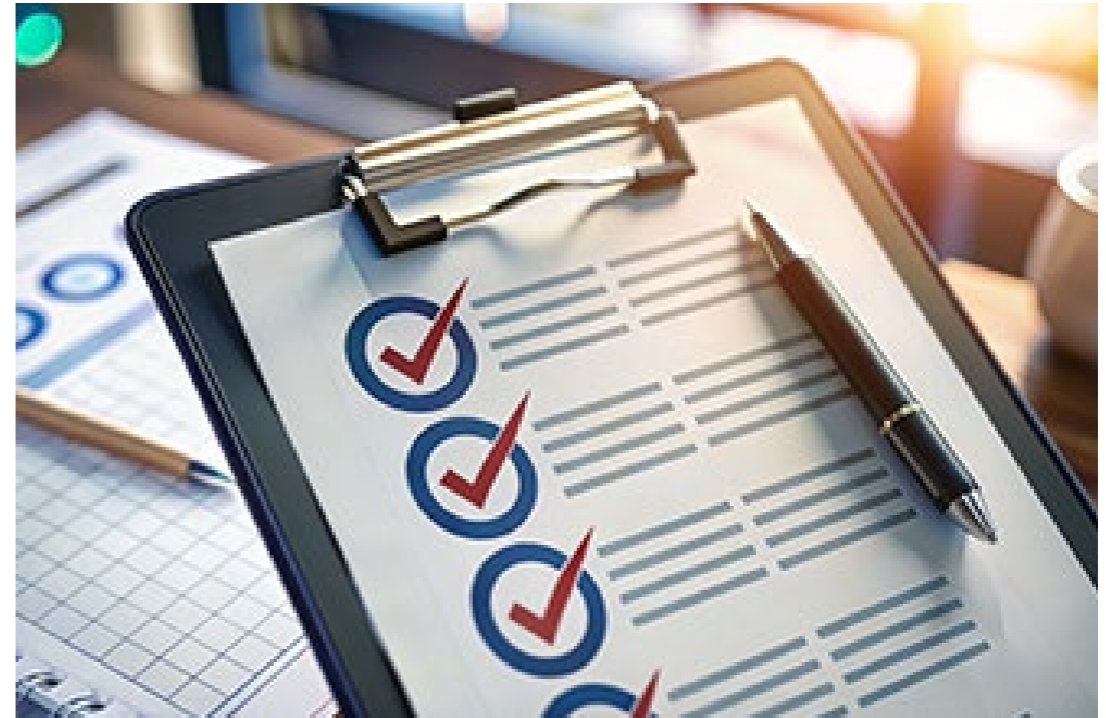
Note that some medically needy children may be served on this waiver as adults



Medicaid 101: How Do People Qualify for HCBS Waivers? (1 of 2)

The federal government requires states to set rules about who can access waivers. These rules include income, conditions, and need.

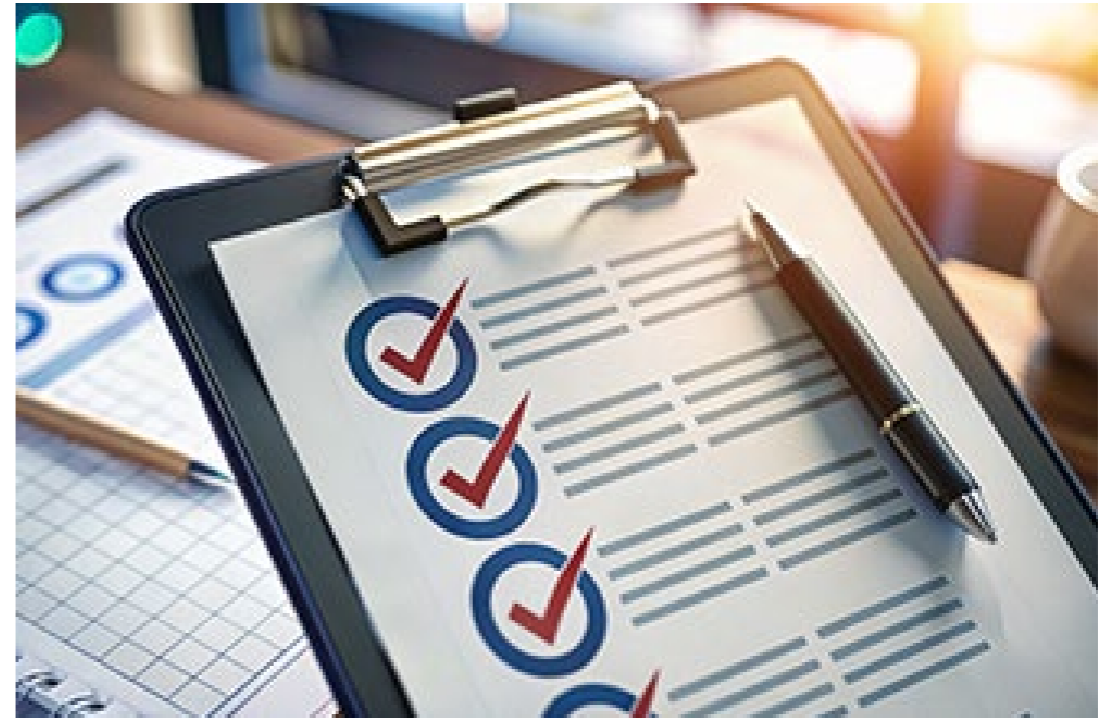
- 1. States must set an income limit for the waiver.**
Typically, this amount is higher than Medicaid State Plan. This means it is usually “easier” to meet waiver income requirements.
- 2. States must list which conditions the waiver will serve.** For example, Autism. If someone does not have the types of conditions covered, they do not qualify for the waiver. There is another step after condition. **Condition alone cannot qualify someone for a waiver.**
- 3. States must also measure someone’s functional support needs.** This is done to show that someone qualifies for the waiver based on need. This process is sometimes called level of care, or LOC. We will talk more about this on the next slide.



Medicaid 101: How Do People Qualify for HCBS Waivers? (2 of 2)

States use an assessment to measure people's functional needs. People must show a certain level of need to qualify for a HCBS waiver.

- HCBS waivers are meant to serve people in their homes instead of institutions. This means the waiver is essentially taking the place of an institution
- To qualify for a HCBS waiver, someone must first show they would qualify to receive care in an institution.
- States decide which types of institutions a waiver is replacing. This is known as the level of care.
- States use an assessment process to measure people's needs. Someone's assessed needs must meet the institutional level of care to qualify for the waiver.



Medicaid 101: Why Do States Use an Assessment Process?

States are required by the federal government to use needs assessments. These assessments also help states gather data to improve the waiver.

- **States are required to assess functional needs. This is part of the waiver eligibility process. The assessment is first done when someone applies for a waiver.**
- Assessments can be used for care planning. They give states information about what services might help a person.
- People on a waiver also complete an annual reassessment. This makes sure the waiver is still the right fit for them. This data can also help states monitor and respond to an individual's changing needs over time.
- Assessments also help states build better programs. Information collected from assessments can help states understand and improve quality.



Checking Understanding: Level of Care

How would you describe level of care, in your own words?

Menti Link: <https://www.menti.com/alcqq1uzt9wb>

Code: 2835 4586



Creating an Assessment Tool



How Will ND Create the New Waiver Assessment Process(es)?

Identify Population

- **Decide the target population. This includes what ages and conditions will be served by the waiver.**
- ND already knows the target population at a high-level
- The CDW subcommittee will help refine the new waiver population

Set Definitions

- **Define what it means to be in the target population**
- This includes the definition for what it means to have certain conditions like ID/DD
- The IID/DD subcommittee will help with this

Establish Criteria

- **Set criteria for who qualifies for the waiver**
- This starts with the definition
- Then, the state adds the functional needs someone should also have

Pick an Assessment Tool

- **Select the tool the state will use to assess if someone qualifies**
- The tool will help the state measure needs and test the criteria
- **This is what we will talk about today.** We will come back to this again after the sub-committees have talked about the other pieces above.



How will CDAC Help?

CDAC will give the state feedback. They will share what is important for the new assessment(s).

- Today we will look at the basics of assessment tools.
- We want CDAC to share your ideas about some of the options ND has.
- In the future, we will talk to subcommittees about other parts of the assessment process.
 - The IID/DD subcommittee will focus on updating the ID/DD definitions.
 - The CDW subcommittee will focus on defining the new populations.
- We will talk about these again as a big group in October. This will help us see how it all works together.



State Assessment Options



What Types of Tools Are There? National versus Homegrown

States can use a national tool or make their own tool.

- States must use an assessment tool to see if someone qualifies for the waiver. This is a federal rule.
- States do have flexibility in what type of tool they use. One choice is how the tool is developed.
- Some states use national tools. These are made by groups for many states to use.
- Some states make their own tools. These are called homegrown tools. Some states also use the homegrown tools that other states made.
- There are benefits and challenges to each type of tool. We will talk more about this together.



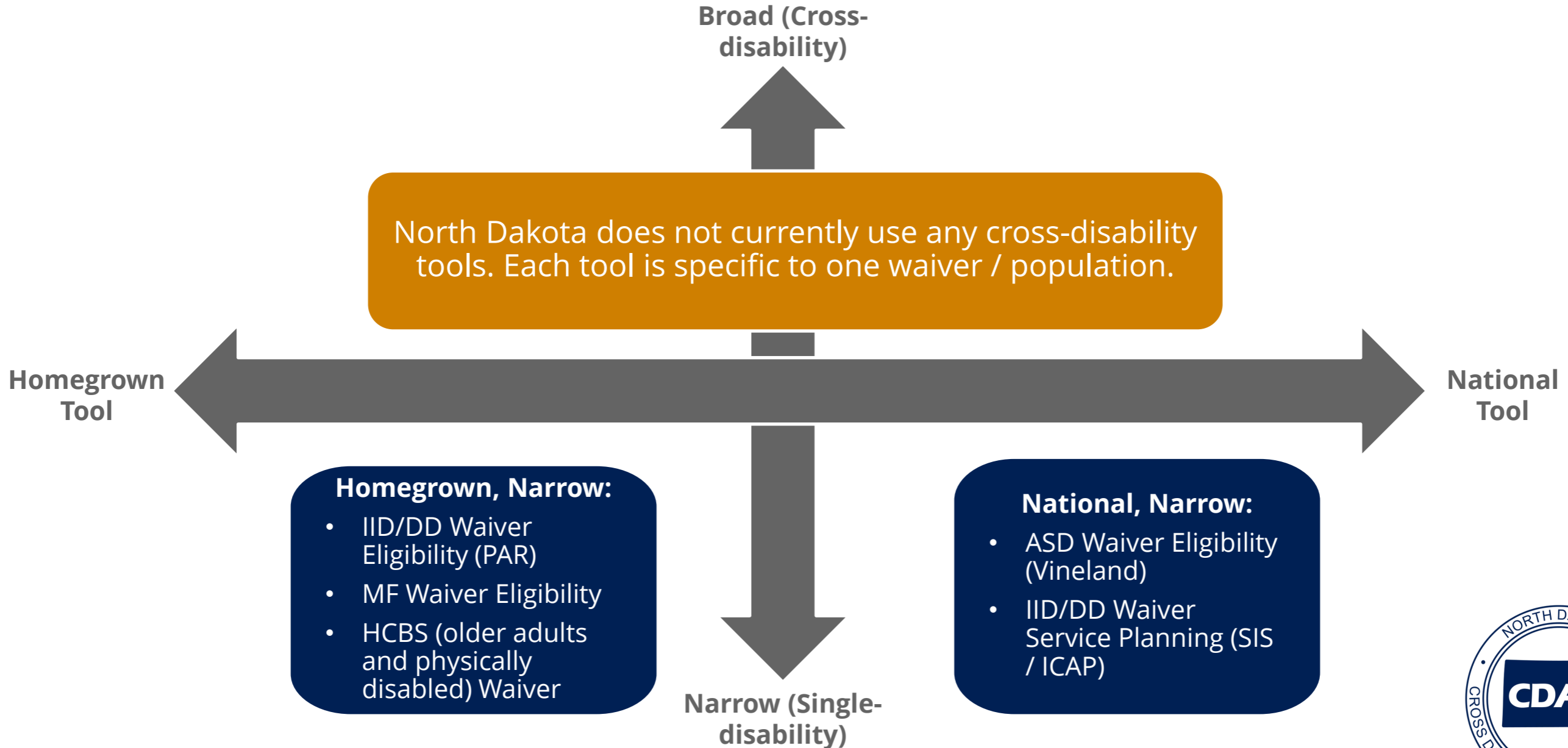
What Types of Tools Are There? Broad versus Narrow

Some tools only look at a small set of conditions. Others can be used for many types of disabilities.

- There are some tools that are designed just for one type of disability.
- Other tools can be used to assess more than one type of disability. These tools are called cross-disability
- There are benefits and challenges for each.



What Types of Tools Does North Dakota Use?



What are the Basics of National Tools?

National assessment tools are created by independent organizations.

- There are some nationally recognized assessment tools created by organizations
- These national tools are independent from any one state
- The tools are often held to very high research standards
- States usually have some flexibility to customize national tools. But most of the tool must stay the same.



What are the Basics of Homegrown Tools?

Homegrown tools are developed by a state for use in that state.

- Some states choose to build their own assessment tool
- These homegrown tools are unique to that state
- It is the state's responsibility alone to update, train, and modify the homegrown tool as needed
- One example of a homegrown tool is MnCHOICES, which was developed by Minnesota



Discussion: National Versus Homegrown Tools

What do you think about national versus homegrown?

- What do you like about the idea of a national tool?
- What concerns you about a national tool?
- What do you like about the idea of a homegrown tool?
- What concerns do you have about a homegrown tool?
- Do you have any other thoughts to share?



What are the Basics of Narrow (Single-Disability) Tools?

Narrow tools just look at one type of condition.

- Some tools are created for one overarching type of condition(s).
- For example, ND uses the PAR for the IID/DD waiver eligibility. This tool is specific for ID/DD. It is not used for anything else.
- Some other single-disability tools include:
 - The Vineland (used for ASD eligibility)
 - The SIS (used for ID/DD)
 - The ICAP (used for ID/DD)



What are the Basics of Broad (Cross-Disability) Tools?

Broad tools have options for multiple conditions.

- Some tools can be used for multiple conditions / waivers.
- Usually, a cross-disability tool is made up of a set of disability-specific assessments.
- Because they are part of the same bigger tool, states can more easily share data between programs. This can help states look at eligibility for more than one program at a time.
- Some cross-disability tools include:
 - The interRAI
 - mnCHOICES



Discussion: Broad versus Narrow

What do you think about broad versus narrow?

- What do you think might be some benefits of using a single-disability tool?
- What concerns you about a narrow tool?
- What do you think might be some benefits of using a broad cross-disability tool?
- What concerns do you have about a cross-disability tool?
- Do you have any other thoughts to share?



Another Consideration: Age



Tools are designed for use with different ages

- There are often adult and child versions of the same assessment tools
- For example, ND uses a tool called the PAR to look at eligibility for the IID/DD waiver. This has two versions.
 - The child PAR is used for kids 0 through 2.
 - People 3+ use the adult PAR
- Do you have any thoughts about age and assessment tools?
 - What might be different for very young kids?
 - What might be the same for kids versus adults?
 - Is there anything about age and assessment that ND should keep in mind?

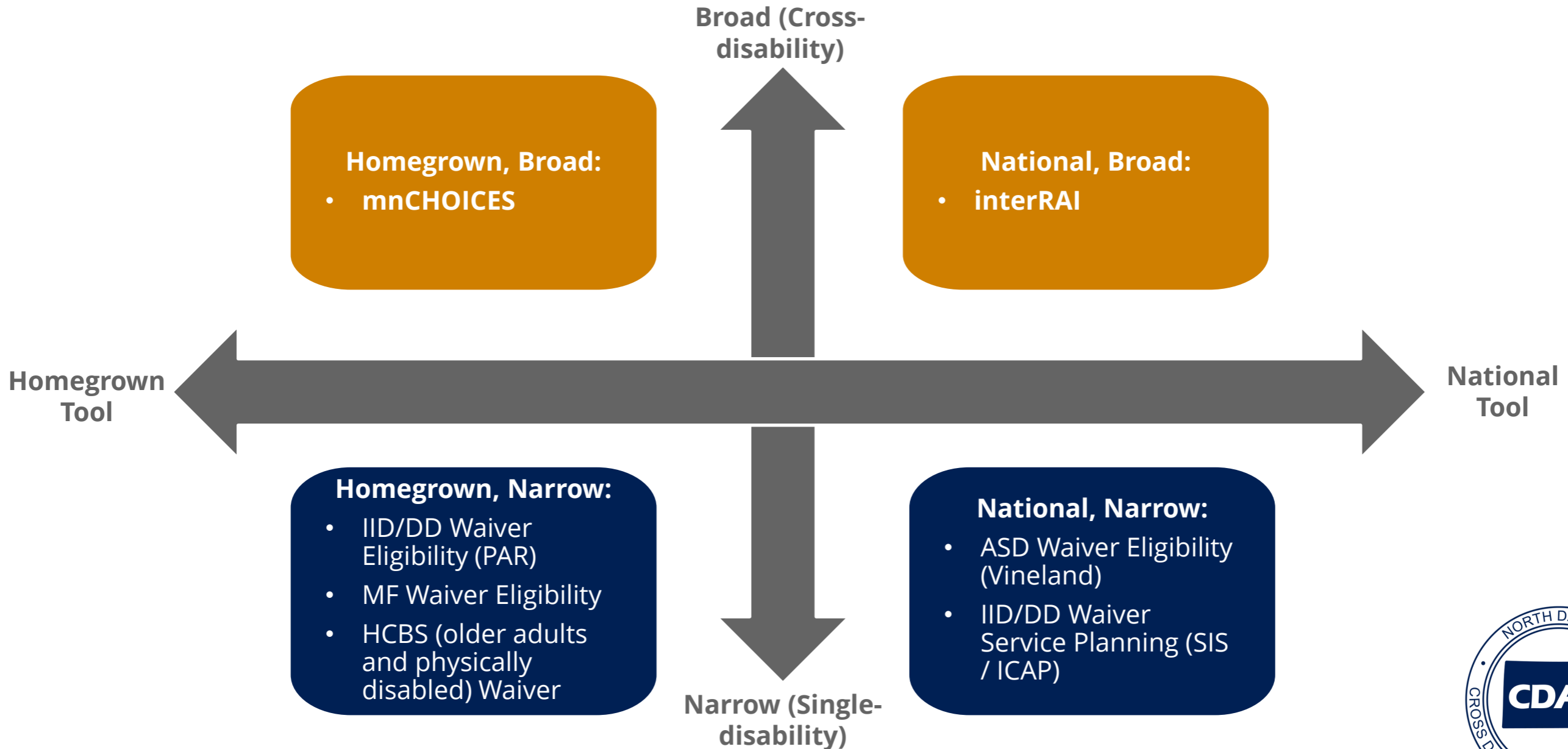


Examples of Specific Tools

What Are Some Other Types of Tools?

 Not currently used in ND
 Used in ND currently

DRAFT



Example National, Narrow Tool: The SIS

The SIS looks at the frequency and levels of support needed.

- The SIS was developed by the American Association of Intellectual and Developmental Disabilities (AIDD)
- The tool is only for people with intellectual and developmental disabilities
- It is focused on acuity levels
- The SIS needs its own software and training
- The SIS is used by many states



Example National, Cross-Disability Tool: The interRAI (1 of 2)

The interRAI is a national tool that looks at people's unique needs.

- The interRAI is a set of tools that help measure someone's needs, strengths, and preferences.
- Lots of researchers helped develop these tools. The tools have high inter-rater reliability. They questions are also standard across the different tools.
- InterRAI tools look at the whole person. This includes health needs, quality of life, services, and preferences.
- The tools are updated and supported by a team of over 100 fellows across the world. This tool is used in 35 countries.



Example National, Cross-Disability Tool: The interRAI (2 of 2)

The interRAI can be used with many different populations.

- interRAI has many tools for lots of populations and needs. This includes both adults and kids.
- States can use data from the assessment in other areas. For example, to help support care planning.
- InterRAI data can help identify risks, like caregiver burnout. It can also help states see trends for planning.
- The assessment can be added to existing software



Example Homegrown, Cross-Disability Tool: MnCHOICES

Minnesota created its own assessment called MnCHOICES.

- Minnesota worked with a vendor to build an assessment
- MnCHOICES is used to assess all people who need long term services and supports
- MnCHOICES is used for both eligibility and service planning
- Minnesota recently updated the assessment. This took four years to do, from 2020-2024.



Example Homegrown, Narrow Tool: ND's PAR

North Dakota created its own single-disability tool called the PAR.

- North Dakota created the Progress Assessment Review (PAR).
- This tool helps decide if people are eligible for the IID/DD waiver. This includes if they meet level of care for the waiver. It also includes if they have a need for waiver services.
- There is a child version of the PAR for kids 0-3.
- People 3+ are assessed using the adult PAR.
- The PAR looks at levels of functioning and support needs



CDAC's Subcommittee Structure



Why CDAC is Using Subcommittees

CDAC will have two subcommittees. This will allow CDAC to cover a lot more ground in the time it has together.

- There is a lot of work to get done in the next two years. CDAC has limited time together.
- Using subcommittees helps CDAC members to become more knowledgeable about some topics and makes it easier to reach decisions.
- The subcommittees will share their insight and the things they learned on their topics with the full group.
- The subcommittees will be focused on the different waivers:
 - Subcommittee #1: IID/DD Waiver
 - Subcommittee #2: CDW



Subcommittee Schedule

CDAC will mostly meet separately in the subcommittees. CDAC will come together as a full group once every three months.

- In some months, CDAC will split into two groups to cover different topics. These will be virtual, 1.5-hour long meetings.
- CDAC will come together as full group for an in-person, day-long meeting once every three months.
- We will meet in subcommittees in September. We will meet as a full group again in October.
- Then, in November we will begin the quarterly cycle of meeting in subcommittees for two months then coming together as a full group in the third month.
- Sometimes the subcommittees will look at **different topics**. Other times, the subcommittees will look at **similar topics with different focuses** across the waivers.



Subcommittee #1: IID/DD

The first subcommittee will focus on tasks related to the IID/DD waiver.

- This subcommittee will address one of the goals of this project:
 - “Update the way people qualify for the IID/DD waiver (through Level of Care (LOC))”
- Reminder about the future state for the updated IID/DD waiver:
 - Modernized rules about who qualifies for the waiver (LOC)
 - Designed to serve people with ID/DD who have the highest needs, including both kids and adults
- This subcommittee will also look at updating ID/DD definitions and criteria.



Subcommittee #2: CDW

The second subcommittee will focus on tasks related to the new cross-disability waiver.

- This subcommittee will address one of the goals of this project:
 - “Create a new HCBS waiver for kids aged 3 until age 21. This waiver will serve kids with different disabilities.”
- Reminder about the future state for the new CDW:
 - Designed to serve all qualifying children with mild to moderate support needs, aged 3 until age 21
 - Two ways for kids to qualify (LOC): Easier LOC for kids 3-5 and; Modernized LOC for kids 6+.
- This subcommittee will provide insight to CDW program design elements (like case management).
 - Some things may be talked about with the IID/DD subcommittee.
 - HHS will be the decision-makers on whether changes for the CDW can also be made in the IID/DD waiver, given budget, resource, and other constraints at the time.



What Subcommittee Are You Interested in Joining?

Think about what subcommittee you'd like to join.

All CDAC members should join one subcommittee.

You should join the subcommittee you have the most relevant expertise for or the most interest in.

Soon, more information will be sent out about signing up for subcommittees.

