

Considering INVOICING Questions and Answers for Prospective Agreement Holders Edmonton Zone

What is Invoicing?

Invoicing is an alternate method of providing Home Care Support Services. It is available to clients who meet the general eligibility criteria for Home Care. Home Care provides three main categories of services; Case Management, Direct Professional Services, and Support Services such as personal care. Instead of Home Care contracting with an agency or providing the service directly, clients or their legal representatives can be reimbursed to an authorized amount of hours if they choose to seek out a contracted provider of their own choosing and purchase their own care.

An Invoicing Agreement is a legal contract between Alberta Health Services and the client or their legal representative. Under the Agreement, Alberta Health Services agrees to reimburse the Agreement Holder with funds to hire or purchase services based on a needs assessment. The Invoicing option provides a client or client's legal representative with a significant degree of control over who provides support services and how these services are provided along with the responsibility to appropriately manage the care needs. An Invoicing Agreement may be signed for a minimum period of 3 months.

From here on in, this document, "you" refers to the client and the Invoicing Agreement Holder. Please note that in some cases client and the Agreement Holder are two different persons.

When is Invoicing Appropriate?

Invoicing can be considered for clients who want to hire their own contracted care providers. Here are some examples of situations where Invoicing can be particularly beneficial.

- **Empower self-management:** Situations where you desire a greater degree of control for scheduling and directing the staff providing your personal care. The Invoicing Option is ideal for those situations where you may not want the degree of responsibility of a Self-Managed Care Contract but desire the benefits of self-management.
- **Enhancement of Current Services:** Invoicing can be used to top up pre-existing services already in place thru AHS contracted providers, In-house Health Care Aides, and Self Managed care in situations that require care beyond what AHS can arrange with their own resources. This may include but is not limited to situations where you have short term intensive needs and may be awaiting placement and/or are at end of life, returning from hospital, or have overnight care needs. Services may also be used to assist caregivers with respite needs and permits a high degree of flexibility in how to provide a meaningful break for caregivers.
- **Language and cultural considerations.** Sometimes it is important for clients to hire care providers from their own communities especially when language is an issue. Choosing your own contracted provider may allow you to choose care providers who have similar language or cultural practices.
- **Geographic areas which are difficult to serve.** Within our Edmonton Zone there are areas where it is particularly difficult for AHS to arrange services thru an AHS contracted provider or internal health care aide staff. Invoicing may allow our clients to hire smaller contracted providers to provide care.

Who is Eligible for Invoicing?

If you are already on Home Care, and require support services, you can contract your Case Manager to discuss whether or not Invoicing is a good option for you. If you're not already on Home Care, the first step in exploring Invoicing is to arrange an initial Home Care assessment. An assessment involves meeting with a Case Manager to get information about your health history, the extent to which you can manage your own care, and how much help you have from family and friends. At the end of the process the Case Manager will work with you and your family to develop a care plan which outlines what additional professional and support services are needed and care to be provided by Home Care.

Invoicing can be considered when the following conditions are met;

- You meet the general eligibility criteria for Home Care services.
- Invoicing is a suitable mode of service delivery as determined by a Home Care assessment.
- Invoicing does not conflict with any other Home Care policy or Home Living Service Agreement.
- Invoicing does not create conflict of interest for you or the care provider, such as if you are residing in a home type setting owned by the care provider.
- You require a predictable level of service and are not subject to frequent acute episodes which create unstable service requirements. (Exceptions may be made for palliative and pediatric clients).
- You or your legal representative is willing and able to assume the responsibilities associated with Invoicing including the responsibilities of directing your own care.

If Invoicing is not a viable option, the Case Manager will work with you to explore other service options to meet your needs.

Who Can Be An Agreement Holder?

Alberta Health Services can enter into an Invoicing Agreement with a client, their legal Guardian, or their Agent under an activated Personal Directive. When an agreement is signed with anyone other than the client, documentation relating to the source of their legal authority must be provided to Alberta Health Services, Home Care. The client can also appoint a Payee on the agreement who pays the contracted provider and receives the reimbursement from Alberta Health Services. Alberta Health Services recommends clients with terminal illnesses to consider naming a Payee to ensure bills are paid appropriately after services are no longer required.

What Services Are Included?

Alberta Health Services provides the Agreement Holder with written authorization to purchase support services privately that will be reimbursed. The level of funds to be reimbursed is based on the Home Care needs assessment. Invoicing may only be used to purchase support services. Equipment, supplies or alternative therapies are not eligible expenses. Clients using the Invoicing model have access to professional

services which are available through Home Care offices. This includes support and education from their Case Manager as well as Nursing, Occupational Therapy, Social Work, Physical Therapy, Respiratory Therapy and Dietician services if required. These services can be accessed by contacting the Case Manager.

What If Your Needs Change?

Agreements are signed for a term during which it is anticipated that you will have relatively stable needs. However, it is possible that your needs or the availability of supports change unexpectedly. If this happens, the Case Manager can be contacted to do a reassessment and discuss changes in services including changing the amount of care provided through the Invoicing Model.

The initial Agreement is signed for a period under six months. After that, a reassessment is done at least once a year to ensure that the level of services is appropriate to meet your needs.

What Are Your Responsibilities as an Agreement Holder?

Making Decisions about Care Arrangements.

As the Agreement Holder, you arrange appropriate services, including directing your care thru your contracted provider. You enter into an agreement with a bonded and insured contracted provider. You will require approval from AHS for your chosen care provider prior to initiation of the invoicing contract. You must ensure that care is being provided appropriately and address any concerns you may have with your contracted provider directly. If you need assistance with informing your contracted care providers about your care needs, you can contact the Case Manager.

So, Is Invoicing The Right Option for You?

Invoicing can be a good option for you if you want to have the responsibility and flexibility of managing your own care but not overseeing employees and staffing concerns. Using the Invoicing model, you will be encouraged to be as independent and self-sufficient as possible but your Case Manager is available as a resource for questions about Invoicing and for accessing other health services.

If you are considering Invoicing, you should discuss with your Case Manager.