

HCBS Final Rule Evidentiary Package

Isabelle's House at Parmly on the Lake



Setting information

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|---|-------------------------------|
| Setting name: Isabelle's House at Parmly on the Lake | ID #: 25276 |
| Street address: 10720 282nd St., Chisago City, MN 55013 | Phone: 651-257-0575 |
| Setting website: Isabelle's House at Parmly on the Lake (https://monarchmn.com/parmly-on-the-lake/) | Date of site visit: 9/18/2018 |

Waiver service type

| Waiver service | Service type: |
|---|-------------------|
| <input type="checkbox"/> Alternative Care (AC) <input checked="" type="checkbox"/> Elderly Waiver (EW) <input type="checkbox"/> Brain Injury (BI) <input type="checkbox"/> Community Access for Disability Inclusion (CADI) <input type="checkbox"/> Community Alternative Care (CAC) <input type="checkbox"/> Developmental Disabilities (DD) | Customized Living |

Reason for heightened scrutiny

| Prong type | Category | Type of setting |
|--|---------------------|---|
| Prong 1 Located in a Public or Private Institution | Name of Institution | Name of Institution Minnewaska Lutheran Home |

Note: The term people/person (resident for residential settings) refers to people who receive Medicaid HCBS waiver service

General summary

Isabelle’s House at Parmly on the Lake is a customized living setting located in Chisago City, Chisago County, 40 miles north of Minneapolis. Chisago City had a population of 4,967 in 2010.

At the time of the provider attestation, Isabelle’s House provided customized living services to 16 people. The setting served four people supported by a home and community-based waiver program.

The customized living setting is a part of a continuum-of-care campus that includes short- and long-stay skilled nursing, in- and outpatient therapy services, a fitness center and three customized living settings. Isabelle’s House and Margaret’s House provide customized living services to people with Alzheimer’s disease or other dementias. The third setting, Vindauga View, provides customized living services to a broader population. Separate evidentiary packages will report on Margaret’s House and Vindauga View. Isabelle’s House and the continuum-of-care campus are operated by Monarch Healthcare Management.

Customized living provider standards/qualifications

Licensure requirements and other state regulations for customized living services clearly distinguish these services/settings from institutional licensure or regulations.

Customized living services are provided in housing-with-services establishments with the service provider directly licensed as a comprehensive home care provider by the Minnesota Department of Health. Customized living services provide an individualized package of regularly scheduled health-related and supportive services to a person who lives in a qualified, registered housing-with-services establishment.

Customized living service definitions that support the setting requirements

Customized living (CL) and 24-hour CL services include component services designed to meet the person’s assessed needs and goals. Individualized CL services may include supervision, home care aide tasks (e.g., assistance with activities of daily living), home health aide task (e.g., delegated nursing tasks), home management tasks, meal preparation and service, socialization, assisting enrollees with arranging meetings and appointments, assisting with money management, assisting participants with scheduling medical and social services, and arranging for or providing transportation. If socialization is provided, it must be part of the service plan, related to established goals and outcomes and not diversional or recreational in nature.

For more details about the component services, including what is covered and distinctions between each see [Customized Living Component Service Definitions, DHS-6790H \(PDF\)](#).

(<https://edocs.dhs.state.mn.us/lfserver/Public/DHS-6790H-ENG>)

Minnesota’s Community-Based Services Manual (CBSM) provides the following requirements for customized living services:

[CBSM page on Customized Living](#)

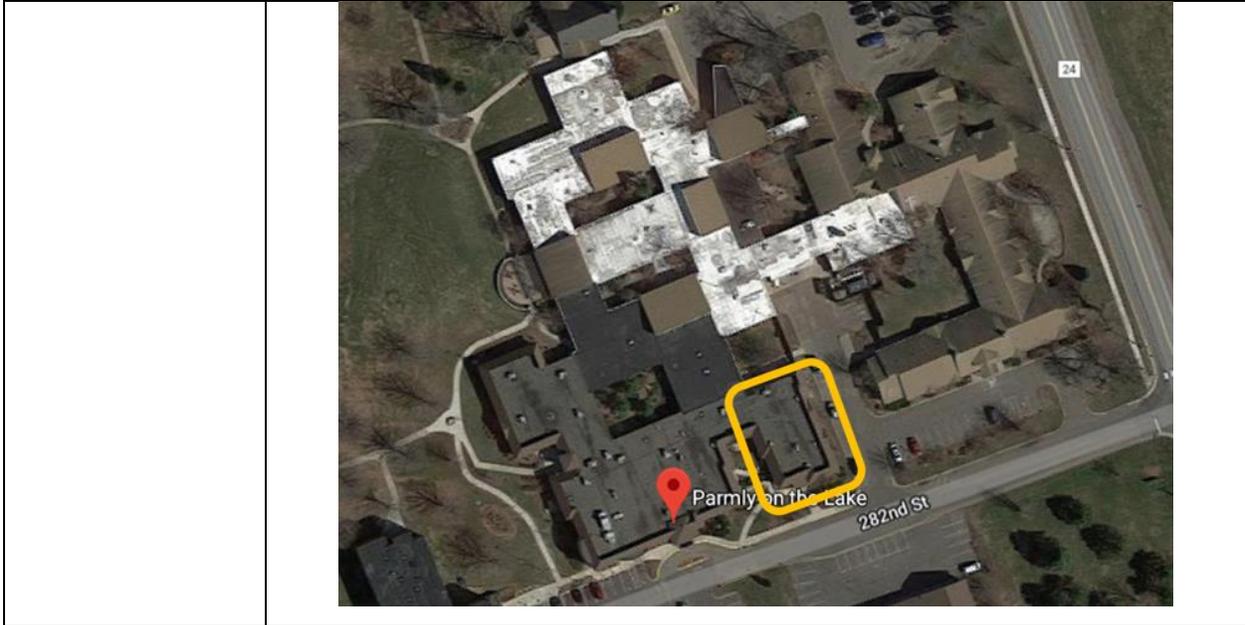
(http://www.dhs.state.mn.us/main/idcplg?IdcService=GET_DYNAMIC_CONVERSION&RevisionSelectionMethod=LatestReleased&dDocName=id_001787#)

Prong 1 and Prong 2 settings

Meaningful distinction between the facility and HCBS setting

| States must submit strong evidence that the setting presumed institutional has the characteristics of a HCBS setting and not an institutional setting. | |
|--|---|
| Determination | Summary |
| <input checked="" type="checkbox"/> Met <input type="checkbox"/> Unmet <input type="checkbox"/> Not applicable | <p>Interconnectedness between the facility and the setting in question, including administrative or financial interconnectedness, does not exist or is minimal.</p> <p>Isabelle’s House, the customized living setting, has separate managers who oversee housing and nursing services in the setting. The managers report to the administrator of the care campus. The setting is financially connected to the campus, but it manages decisions about financial matters at the setting level as well.</p> |

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| <input checked="" type="checkbox"/> Met <input type="checkbox"/> Unmet <input type="checkbox"/> Not applicable | <p>To the extent any facility staff are assigned occasionally or on a limited basis to support or back up the HCBS staff, the facility staff are cross-trained to meet the same qualifications as the HCBS staff; (staff training materials that speak of the need to support individuals’ chosen activities), (person centered planning), (the staff is trained specifically for home and community-based support in a manner consistent with the HCBS settings regulations.)</p> <p>All staff that work in the customized living setting receive HCBS settings rule training and other relevant training and orientation for the setting. The direct care staff working in the nursing facility do not work in customized living setting.</p> |
| <input checked="" type="checkbox"/> Met <input type="checkbox"/> Unmet <input type="checkbox"/> Not applicable | <p>Participants in the setting in question do not have to rely primarily on transportation or other services provided by the facility setting, to the exclusion of other options; (Describe the proximity to avenues of available public transportation or an explanation of how transportation is provided where public transportation is limited.)</p> <p>People living in this customized living setting have several options for transportation to support community engagement and inclusion, including: the setting’s own van; Heartland Express, the public transit provider; rides from family and friends; and local taxi services.</p> |
| <input checked="" type="checkbox"/> Met <input type="checkbox"/> Unmet <input type="checkbox"/> Not applicable | <p>The setting provides HCBS services in a space that is distinct from the space that institutional services are provided.</p> <p>The customized living setting is separate from the nursing facility. The customized living setting has its own signage and entrance. The setting is connected to the nursing facility by a hallway and doorway. People served in the setting and visitors may come and go from a separate entrance from the nursing facility’s main entrance. In the image below the setting is outlined in gold. The rest of the care campus is shown above the setting.</p> |



Community engagement opportunities and experiences

Isabelle's House is a customized living setting focused on caring for people with Alzheimer's disease and other dementias. It offers engagement opportunities that are specifically planned for the setting and the people who live in the setting. People living in the setting may also access programming planned for the rest of the care campus, as they desire.

Community engagement is overseen by the setting's managers and by activity staff who plan activities tailored to the interests of the people living in the setting. People served in the setting, and their family members, provide input through interest assessment forms and direct communication with staff. People learn about activities offered in the setting through direct reminders from the staff.

The setting supports regular activities in the community with the support of their program van, volunteers, and family and friends of those living in the setting. Activities offered:

- Errands and medical appointments
- Community events and festivals
- Restaurants and social outings
- Fishing trips and sightseeing drives

The on-site, programmed activities are robust at this setting. The offerings include: regularly scheduled exercise sessions, music and art-making, baking, various games and visits from area clergy and church staff.

| Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday |
|--|--|---|---|---|--|---|
|  | | | | | | 1 10:00 Morning Movie RA 2:00 Horse Shoes 3:30 Junk Drawer Detective |
| 2 9:15 Worship C 2:00 Bag Toss 3:00 Jane's Jingles 4:15 LCR Dice Game | 3 11:00 Movin' It! 1:00 Art Club <i>Labour Day</i> | 4 10:00 Broom Hockey 3:00 Music with Eric 4:15 Manicures 5:15 Lullaby Baby | 5 9:15 Worship C Immanuel Lutheran, Almelund 9:45 Make Bread & Finish the Phrase 1:30 Wellness Workout 3:15 Bread & Bunco | 6 10:00 Catholic Communion C 10:30 Games with Carly 11:00 Jane's Jingles 1:30 Wellness Workout 3:45 Bowling 5:15 Sensory Spa | 7 10:15 Bingo 1:00 Target Lotto 4:00 Musical Memories | 8 10:00 Morning Movie RA 2:00 Elvis is Back! RDR 3:30 Kick Ball |
| 9 9:15 Worship C 3:00 Jane's Jingles <i>Grandparents Day</i> | 10 11:00 Spiritual Group 1:30 Mia & Barb 3:00 Capture the Moment <i>Picture Sharing</i> 5:15 Sensory spa <i>Rosh Hashanah</i> | 11 10:00 Broom Hockey 10:30 Service of Remembrance C 3:00 Music with Eric 4:15 Capture the Moment <i>Photo Shoot</i> 5:15 Lullaby Baby | 12 9:15 Worship C Trinity Lutheran, Lindstrom 9:45 Make Bread & Finish the Phrase 1:30 Wellness Workout 3:15 Bread & Bunco | 13 11:00-2:30 Staff Picnic & Entertainment Vindauga <i>Courtyard</i> 10:00 Catholic Mass C 10:30 Games with Carly 11:00 Jane's Jingles 1:30 Wellness Workout 3:45 Bowling 5:15 Sensory Spa | 14 10:15 Bingo 1:00 Target Lotto 4:00 Capture the Moment <i>Portrait Distribution L</i> | 15 10:00 Morning Movie RA 2:00 Bag Toss 3:30 Art Club |
| 16 9:15 Worship C 2:00 Bag Toss 3:00 Jane's Jingles 4:15 LCR Dice Game | 17 9:15 Movin' It! 11:00 Spiritual Group 1:30 Mia & Barb 2:45 Musical Memories | 18 10:00 Broom Hockey 3:00 Music with Eric 4:15 Manicures 5:15 Lullaby Baby | 19 9:15 Worship C Zion Lutheran, Chicago City 9:45 Finish the Phrase 1:30 Wellness Workout 1:30 Fall Leaves Tour & Ice Cream <i>Iron Piggy</i> | 20 10:00 Catholic Communion C 10:30 Games with Carly 11:00 Jane's Jingles 1:30 Wellness Workout 3:45 Bowling 5:15 Sensory Spa | 21 10:15 Bingo 1:00 Target Lotto 2:00 Johnson Bros Entertainment RDR 4:00 LCR Dice Game | 22 10:00 Morning Movie RA 3:00 Table Games <i>Autumn Regatta</i> <i>Obstacle Course</i> |
| 23 9:15 Worship C 3:00 Jane's Jingles | 24 11:00 Spiritual Group 1:30 Mia & Barb 3:00 Apple Baking | 25 10:00 Broom Hockey 3:00 Music with Eric 4:15 Manicures 5:15 Lullaby Baby | 26 9:15 Worship C Christ Lutheran, Marine on St Croix 9:45 Make Bread & Finish the Phrase 1:30 Wellness Workout 3:15 Bread & Bunco | 27 10:00 Catholic Communion C 10:30 Games with Carly 11:00 Jane's Jingles 1:30 Wellness Workout 3:45 Bowling 5:15 Sensory Spa | 28 10:15 Bingo 1:00 Target Lotto 4:00 Musical Memories | 29 10:00 Morning Movie RA 2:00 Horse Shoes 3:30 Junk Drawer Detective |
| 30 9:15 Worship C 2:00 Bag Toss 3:00 Jane's Jingles 4:15 LCR Dice Game | Celebrating National Assisted Living Week September 9-15 "Capture the Moment" | | | | | Calendar is subject to change |

HCBS characteristics

This section is a summary of the individual HCBS characteristics required in the HCBS rule. The findings for each characteristic are identified through the setting attestation documentation, on-site observation or both.

| HCBS Rule requirement | Compliance status (Please select) |
|--|-----------------------------------|
| <p>Each person at the setting has a written lease or residency agreement in place providing protections to address eviction processes and appeals.</p> <p><input checked="" type="checkbox"/> Compliant documentation submitted with attestation</p> <p><input checked="" type="checkbox"/> Observation made during on-site visit</p> <p>The setting provided a lease agreement as documentation through the provider-attestation process. A manager in the setting confirmed during the site visit that all people served in the setting are provided a written lease when they move into the setting.</p> | Compliant |

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| <p>Each person at the setting has privacy in his/her sleeping or living unit including a lockable door.</p> <p><input checked="" type="checkbox"/> Compliant documentation submitted with attestation</p> <p><input checked="" type="checkbox"/> Observation made during on-site visit</p> <p>Locks were observed on all unit doors in the setting. A manager interviewed explained that people living in the setting use keys unless it is not supported by their individual care plans.</p> | <p>Compliant</p> |
| <p>The setting facilitates that a person, who shares a bedroom, is with a roommate of his or her choice.</p> <p><input checked="" type="checkbox"/> Compliant documentation submitted with attestation</p> <p><input checked="" type="checkbox"/> Observation made during on-site visit</p> <p>Living units are not shared in this setting, unless a person desires to live with a spouse, partner or another person of their choice. At the time of the site visit, all people living in the setting were living alone in their living units.</p> | <p>Compliant</p> |
| <p>The setting provides people with the freedom to furnish and decorate their bedroom and living unit within the lease or residency agreement.</p> <p><input checked="" type="checkbox"/> Compliant documentation submitted with attestation</p> <p><input checked="" type="checkbox"/> Observation made during on-site visit</p> <p>The lease allows people in the setting to decorate and personalize their living units. Living units were observed during the site visit and were decorated as people desired.</p> | <p>Compliant</p> |
| <p>The setting provides people the freedom and support to control their daily schedules including access to food at any time.</p> <p><input checked="" type="checkbox"/> Compliant documentation submitted with attestation</p> <p><input checked="" type="checkbox"/> Observation made during on-site visit</p> <p>A direct care staff person in the setting who was interviewed said that they regularly change the schedule of the services they deliver based on the preferences of the people living there.</p> <p>Food and beverages are available in the setting’s common kitchen area throughout the day. People in the setting may also store and enjoy food and drinks in their living units, as they desire.</p> | <p>Compliant</p> |

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| <p>The setting allows people to have visitors at any time.</p> <p><input checked="" type="checkbox"/> Compliant documentation submitted with attestation</p> <p><input checked="" type="checkbox"/> Observation made during on-site visit</p> <p>A manager in the setting who was interviewed confirmed that visitors can come and go as they like, and that there are not any restrictions on visiting the setting. There is a separate entrance and parking area for the setting. The setting promotes active involvement by friends and family. One family member was observed visiting the setting during the building tour.</p> | <p>Compliant</p> |
| <p>The setting provides opportunities for people to seek employment and work in competitive, integrated settings.</p> <p><input checked="" type="checkbox"/> Compliant documentation submitted with attestation</p> <p><input checked="" type="checkbox"/> Observation made during on-site visit</p> <p>People living in the setting at the time of the site visit had advanced stages of dementia and were not employed. A manager in the setting confirmed that the setting accommodates people’s preferences so that they can keep the schedule they prefer.</p> | <p>Compliant</p> |
| <p>The setting is physically accessible to the individual.</p> <p><input checked="" type="checkbox"/> Compliant documentation submitted with attestation</p> <p><input checked="" type="checkbox"/> Observation made during on-site visit</p> <p>The common spaces and living units were observed to be accessible. Living units and bathrooms were observed to have accessibility features. The living units’ bathrooms had grab bars surrounding the toilets and bathroom sinks that allow wheelchairs closer access to the faucets. The setting supports a reasonable accommodations process, as needed.</p> | <p>Compliant</p> |
| <p>The setting provides people opportunities to access and engage in community life.</p> <p><input checked="" type="checkbox"/> Compliant documentation submitted with attestation</p> <p><input checked="" type="checkbox"/> Observation made during on-site visit</p> <p>Staff are aware of transportation options in their area and work with people in the setting to arrange for rides, as needed. The setting also has a program van to support community engagement opportunities.</p> | <p>Compliant</p> |

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| <p>A manager confirmed that people served in the setting have options for on-site and off-site medical services. They inform all people of their right to choose providers from the wider community. People living in the setting use a mix of on-site and community medical providers. Some choose to use community providers exclusively.</p> | |
| <p>The setting supports the person’s control of personal resources.</p> <p><input checked="" type="checkbox"/> Compliant documentation submitted with attestation</p> <p><input type="checkbox"/> Observation made during on-site visit</p> <p>The setting does not assist people in the setting with their personal resources. People living in the setting are properly informed of this right.</p> | <p>Compliant</p> |
| <p>The setting ensures people’s right to privacy.</p> <p><input checked="" type="checkbox"/> Compliant documentation submitted with attestation</p> <p><input checked="" type="checkbox"/> Observation made during on-site visit</p> <p>The setting has a compliant policy with respect to peoples’ privacy. People living in the setting had private living units.</p> <p>A number of people in the setting were enjoying time in their private living units during the on-site visit. Staff make a practice of knocking on living unit doors before entering these private spaces.</p> | <p>Compliant</p> |
| <p>The setting ensures people’s dignity and respect.</p> <p><input checked="" type="checkbox"/> Compliant documentation submitted with attestation</p> <p><input checked="" type="checkbox"/> Observation made during on-site visit</p> <p>During the site visit, staff were observed treating people living in the setting with respect. The people in the setting were well groomed and dressed.</p> | <p>Compliant</p> |
| <p>The setting ensures people’s freedom from coercion and restraint.</p> <p><input checked="" type="checkbox"/> Compliant documentation submitted with attestation</p> <p><input type="checkbox"/> Observation made during on-site visit</p> <p>Setting staff are trained on the Minnesota Home Care Bill of Rights and the Minnesota Vulnerable Adults Act. A copy of the Home Care Bill of Rights is also given to people to inform them of their right to be free from coercion and restraint.</p> | <p>Compliant</p> |

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| <p>The setting optimizes individual initiative, autonomy, and independence in making life choices, including daily schedule and with whom to interact.</p> <p><input checked="" type="checkbox"/> Compliant documentation submitted with attestation</p> <p><input checked="" type="checkbox"/> Observation made during on-site visit</p> <p>People living in the setting may choose to participate in planned activities as they like, but they can also choose independent activities of their choosing in their living unit or in the setting's common space.</p> <p>A manager in the setting said that direct staff are very good at tailoring activities to individual people, and that family members are also quite engaged with their loved ones' care in this setting.</p> | <p>Compliant</p> |
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Pictures of the HCBS setting



Common kitchen area with food and drink available throughout the day



Interior entrance to Margaret's House from the care campus hallway



Sample image of walking trails between care campus and a nearby lake



Sample poster for on-site community engagement activity at the setting

Public comment summary

The Minnesota Department of Human Services (DHS) did not receive public comments for this setting.

DHS sought public comment from April 30, 2019, to June 9, 2019, before submitting settings to the Centers Medicare & Medicaid Services (CMS) for heightened scrutiny.

We sought public comments using the following methods:

- Evidentiary packages posted online on the [Home and Community Based Services Rule transition plan page](#)
- Evidentiary packages specific to each setting posted in a common area of the setting
- Notice of public comment period via [May 10, 2019, eList announcement](#)
- Notification to lead agencies via regional resource specialists
- Notification to providers via email
- Notification to managed care organizations and Area Agencies on Aging (AA) via email
- Notification to long-term care ombudsman office via email
- Disability Hub MN virtual insight panel.

Minnesota's recommendation

Date of recommendation: 7/1/2019

Minnesota supports that this setting overcomes the institutional presumption and meets the requirements of a home and community-based setting. Provider is required to maintain on-going compliance with all HCBS requirements.