Topic: Developmental Disabilities

Due date: 

Subject: Core Competency Training Requirements for Services Coordinators and Personal Agents

Applies to (check all that apply):

☐ All DHS employees
☐ Area Agencies on Aging
☐ Aging and People with Disabilities
☐ Self Sufficiency Programs
☒ County DD Program Managers
☒ ODDS Children’s
☒ Residential Services
☐ Child Welfare Programs

☒ County Mental Health Directors
☒ Health Services
☒ Office of Developmental Disabilities Services (ODDS)
☒ ODDS Children’s Intensive In Home Services
☐ Stabilization and Crisis Unit (SACU)
☒ Other (please specify): Brokerage Directors; Personal Agents; Services Coordinators

Action required: Oregon’s Core Competency training for Services Coordinators (SCs) and Personal Agents (PAs) is in the DHS iLearn system. This is required training for all new and existing SCs and PAs working within the field of intellectual and developmental disabilities.

Core Competency training consists of a mix of online and local training sessions. See the attached SC-PA Core Competency Master List for a complete listing of online and local training sessions. For convenience, a list of those trainings that are local only (not included in the iLearn modules) are also attached. Required local training is provided through the case management agency or other resources. The competencies focus on the basics of providing case management services and include the values and philosophies of person-centered practices.

All newly hired SCs and PAs who begin work after January 1, 2017 must complete all Tier 1 modules within 30 days of their start date of work and before working unassisted. Tier 2 modules must be completed within 3 months of the start date of work.
All SCs and PAs hired before January 1, 2017 must complete Tier 1 and Tier 2 trainings by June 30, 2017. This includes all long-term employees.

Completion of Tier 1 and Tier 2 Core Competency modules will meet the annual 20 hour training requirements found at OAR 411-415-0050 (d).

Your agency is responsible for tracking completion of Core Competency training sessions. This includes local and online trainings. Training completed in the iLearn system is captured in learners’ transcripts, which can be downloaded and/or copied. See the attached document called “How do I check my transcripts/training records?” for assistance. CDDPs and Brokerages must maintain evidence of completed core competency training in each SC/PA personnel file.

Brokerage Directors, CDDP Program Managers, Protective Services Investigators, local foster care licensors, eligibility staff and SC/PA supervisors or lead staff are encouraged to review all the Core Competency modules to remain current with what staff is learning. Also attached is “DD Partner Instructions” to help you with the DHS iLearn system.

Agencies should review and update their training policies to reflect these changes.

**Definitions:**

**LOCAL TRAINING:** Training provided by a trainer or supervisor at your agency, or a course developed and trained by someone outside of the agency (e.g. Abuse Reporting, Needs Assessment, etc.)

**ONLINE COURSE:** Core Competency training modules for SC/PAs are located in the DHS/OHA iLearn at https://ilearn.oregon.gov. Course numbers identify the Core Competency modules. Reading materials, videos and resources are included. An online quiz is required for each module. Passing a module requires 85% correct answers. iLearn tracks the courses passed by each SC/PA and records them within each person’s transcript.

**PHYSICAL DEMONSTRATION:** Showing a skill, task or concept to a trainer or supervisor. This is often necessary in local training.

**READING:** There are recommended reading materials in the Resources tab of some modules. These are additional and relevant materials to supplement the training slides. Your organization may have additional required reading materials.

**TIER 1 TRAINING:** 25 modules covering a variety of basic case management topics.

**TIER 2 TRAINING:** 8 modules covering advanced topics relevant to the delivery of case management services.
VERBAL PRESENTATION: Successfully explaining a skill, task or concept to a trainer or supervisor. This is often necessary in local training.

WORKING UNASSISTED: Personal Agents and Services Coordinators are required to complete Tier 1 modules within 30 days of their start date and before working unassisted with people receiving services. When an experienced SC/PA is not available to assist a new employee in work with a person in services, a Program Manager, Brokerage Director or designee should provide support. SCs and PAs hired before January 1, 2017, with three months or more of case management experience, are exempt from the requirement of completing Tier 1 training before working unassisted.

Reason for action: The Office of Developmental Disabilities Services supports an educated workforce versed on the fundamentals of providing case management services using the values and philosophies of person centered planning and practices. The Centers for Medicare and Medicaid Services have increased expectations on states to provide consistent and foundational training for people providing case management services.

Field/stakeholder review: ☒ Yes ☐ No
If yes, reviewed by: Feedback from the field gathered through Sarah Jane Owens and Katie Rose.

If you have any questions about this action request, contact:

<table>
<thead>
<tr>
<th>Contact(s)</th>
<th>Marilee Bell</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone</td>
<td>503-947-5262</td>
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<td>Email</td>
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Fax: |
This guide provides details about the required core competencies for Services Coordinators and Personal Agents (SC/PAs). Each competency statement and its learning objectives are provided, along with the expected training requirements and methods for assessing competency.

Definitions

- **Local training**: Training provided by a trainer/supervisor at your organization or a curriculum developed and trained by an outside entity (e.g. First Aid/CPR).
- **Online course**: Training which the learner completes on the DHS Learning Center, [https://ilearn.oregon.gov](https://ilearn.oregon.gov) under the course number listed. Online courses include content to be read, videos, resources, and an online quiz to be completed by the learner. In order to complete the course, the included quiz questions must be answered with at least 85% accuracy. Successful completion of each course is tracked within the learner’s transcript inside the DHS Learning Center.
- **Oral demonstration**: Demonstrating competency by explaining a skill, task, or understanding of a concept to another person.
- **Physical demonstration**: Demonstrating a skill, task, or understanding of a concept while observed by trainer or supervisor.
- **Reading**: In most cases, recommended reading materials are provided in the Resources tab of the related online course. Your organization may require other reading materials as well.
Throughout this document, items shaded in light gray indicate local training or assessment expectations.
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*Must be completed within 3 months of start date*

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## SC/PA Core Competencies Tier 1: Must be completed within 30 days of start date and before working unassisted

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<td><strong>101. Introduction to Tier 1</strong></td>
<td>Begin Tier 1 by launching this online module. It will introduce you to the core competencies expectations. When you finish all of the online and local requirements for Tier 1, return to this module to acknowledge that you have completed all of the training requirements of Tier 1.</td>
<td><strong>Online course only</strong></td>
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| **102. What It Means to Provide Good Case Management (Part 1)** | Introduction to the role of case management.  
1. Understand the basics of effective communication skills including active listening and conveying accurate information in a manner that can be understood by the person receiving services, families, and others.  
2. Understand basic professionalism and courtesy. This includes timeliness, respectful communication, returning phone calls and emails in a timely manner, and providing good customer service.  
3. Understand how to maintain an impartial point of view when giving options, explaining services, etc. This includes having an awareness of when your own personal values may be influencing your capacity to act impartially.  
4. Understand that case management provides information and referral. Develop an awareness of available resources (including services offered by the local CDDP and/or brokerage(s)) and be able to connect people to resources as needed. This may also include awareness of local organization database or other information and referral tools, awareness of other service agencies including DSO, SSA, VR, schools, etc., and awareness of DHS Staff Tools website.  
5. Understand that case management requires long-term vision combined with the ability to focus on immediate needs of the person.  
6. Understand the concept of “nothing about me without me” and the importance of including the person in planning.  
7. Understand basic team facilitation skills, including problem solving, action planning, and leading a meeting.  
8. Understand basic conflict resolution.  
9. Understand the importance of time management and prioritization within your job.  
10. Understand that case management must maintain professional boundaries.  
11. Understand your organization’s policies regarding accepting gifts, relationships, and use of social media.  
12. Understand your organization’s policies addressing your personal safety while on the job.  
13. Understand your role within the scope of your organization’s policies when confronted with illegal activity. | **Online course**  
**Local training:** Training on your organization’s expectations; policies, and procedures; personal safety on the job.  
**Reading:** Tip sheet on stress and burnout | |
<p>| <strong>103. What It Means to Provide Good Case Management (Part 2)</strong> | | | |</p>
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<td>104. Rights, Complaints, and Being a Proponent</td>
<td><strong>Rights</strong>: Understand that basic civil and human rights are extended equally to persons served within the Oregon I/DD system.  &lt;br&gt; 1. Understand that the people you support have the same civil and human rights as all citizens unless restricted through court action (such as guardianship).  &lt;br&gt; 2. Be aware that other circumstances may limit an person's rights such as ISP team decisions, civil court commitment, parole or probation, and Psychiatric Security Review Board (PSRB) decisions.</td>
<td>Online course</td>
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<td><strong>Rights</strong>: Able to identify rights possessed by persons in service beyond basic human and civil rights, including but not limited to the choice of residence and place of employment, freedom of movement, and freedom of communication and association.  &lt;br&gt; 1. Understand and be able to explain rights people have, including the ability to choose/change case management, choose where to live, where to work, refuse services, refuse medications or treatments, choose health care and other professional service providers, confidentiality of personal information, and private communication (including personal mail and access to a telephone).  &lt;br&gt; 2. Understand and be able to explain that utilizing publicly funded services includes cooperating with certain monitoring requirements.  &lt;br&gt; 3. Understand the case management role in informing of rights and obtaining required documentation.</td>
<td>Online course only</td>
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<td><strong>Complaints and Being a Proponent</strong>: Understand the resources a person has when rights are violated, services are denied, or when a person is dissatisfied with the quality of services. This includes the policies and processes for complaints and appeals.  &lt;br&gt; 1. Understand and be able to explain the complaints and appeals processes of the Oregon I/DD system.  &lt;br&gt; 2. Awareness that provider organizations have their own complaint policies in place.  &lt;br&gt; 3. Understand the case management role to assist the person in addressing an issue as needed.  &lt;br&gt; 4. Understand and be able to explain the complaints and appeals processes of your organization.</td>
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<td><strong>Local training</strong>: Training on your organization's complaint policies.  &lt;br&gt; <strong>Oral demonstration</strong>: Demonstrate understanding of your organization's complaint policies.</td>
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### SC/PA Core Competencies Tier 1: Must be completed within 30 days of start date and before working unassisted

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| 105. Person Centered Language | Understand and use person centered language in all interactions.  
1. Understand how to speak of the person first, then the disability only when necessary.  
2. Understand how to emphasize abilities, not limitations.  
3. Understand that defining a person by his/her disability can contribute toward incorrect perceptions and create additional barriers to overcome. | Online course only | |
| 106. Case Management and Provider Qualifications | **Case Management Qualifications:** Understand the need to meet the qualification requirements for providing case management services, including acquiring necessary training as needed.  
1. Understand the qualification requirements for providing case management services.  
2. Understand the initial and ongoing training requirements for case management per Oregon Administrative Rule (OAR).  
3. Understand the initial and ongoing training requirements for case management per your organization’s policy. | Online course  
**Local training:** Learn your organization’s expectations for initial and ongoing training.  
**Reading:** Oregon Administrative Rules: Community Developmental Disability Programs; Support Services For Adults With Intellectual Or Developmental Disabilities | |
| | **Qualified Providers:** Be able to explain the types of service providers in Oregon and understand the qualifications required of each.  
1. Understand and be able to explain various types of providers of service, including in-home services, employment and residential provider organizations, foster homes, personal support workers, independent contractors, general business providers, and others.  
2. Understand that there are rules that govern providers of service.  
3. Know where to locate the most current OARs and rule interpretation guidelines. | Online course  
**Reading:** DHS Criminal Records and Abuse Check Rules | |
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| 107. Introduction to Person Centered Practices | Understand the principles of person centered practices and how they are used by case management.  
1. Understand the importance of using person centered practices to gather meaningful information about a person’s needs, preferences, and goals.  
2. Have a basic awareness of person centered thinking skills, including understanding the importance of digging deeper to learn more meaningful details about the person’s preferences and support needs, problem solving, learning about relationships in the person’s life, and ways of recording learning.  
3. Have a basic awareness of person centered planning and how it can be used to identify what’s happening in a person’s life, the person’s goals and dreams, as well as make long and short-term plans for the future. This may include exposure to processes such as Essential Lifestyle Planning (ELP), Discovery processes used in career development, PATH/MAPs, etc.  
4. Understand the concept of identifying what is important to (dreams and personal preferences) and what is important for (health and safety needs) a person and the value of striving toward a balance between them.  
5. Know how to gather detailed information from various perspectives including the person, guardian, family, paid providers, and others that the person identifies. Understand tools that can help gather detailed information and record various perspectives.  
6. Able to recognize and look past barriers or constraints when listening to what is important to the person.  
7. Understand that services and supports are flexible and responsive to a person’s identified needs and preferences. | Online course  
Reading: Handout of various available person centered planning approaches | |
| 108. Seeking the Person’s Perspective | Understand case management’s role to ensure the person’s perspective is sought and know that it is critical in planning.  
1. Learn how to identify needs, strengths, and interests using open ended questions.  
2. Recognize dignity of the person and family first and foremost.  
3. Recognize situations where it may be necessary to ask questions in different ways to get more information, even after someone has indicated a reluctance to share information.  
4. Understand that case management is a “proponent;” one who does not serve as an advocate for the person, but rather as one who ensures the person’s perspective is sought and used to direct planning. | Online course only | |
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| **109. Conflict of Interest** | Able to recognize conflict of interest, explain it to others, and take action when necessary.  
1. Understand the definition of conflict of interest provided by ODDS.  
2. Able to explain the definition and examples of conflict of interest to others.  
3. Understand the case management role in addressing conflict of interest with the ISP team when it is present. | Online course only                                      |                              |
| **Online course #___**       |                                                                                                                                                                                                                                           |                                                             |                              |
| **110. Reporting Serious Events** | Understand case management's role in completing or reviewing documentation for serious events, including incident reports, death notifications, and SERT reporting.  
1. Able to identify serious events that trigger the need to complete additional documentation and follow-up.  
2. Able to locate and complete the required documentation for identified serious events within expected timelines. | Online course                                      |                              |
| **Online course #___**       |                                                                                                                                                                                                                                           | Local training: Learn how to complete required forms.       |                              |
|                          |                                                                                                                                                                                                                                           | Physical demonstration: Demonstrate ability to successfully complete required forms. |                              |
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| 111. Oregon ISP Process (Part 1): Planning Overview and Natural Supports | **Purpose of the ISP:** Understand the purpose of the Individual Support Planning (ISP) process.  
1. Understand the purpose and importance of planning and how it relates to the person directing his/her own life.  
2. Understand that the ISP is crafted following a person centered process. Information is gathered about what is important to the person (preferences and goals) and what is important for the person (support needs) and that information is used to drive all services that are provided under the plan.  
3. Understand the importance of keeping the plan current throughout the year by making changes as directed by the person or the ISP team.  
4. Understand a person's rights when it comes to his/her ISP, as well as the case management's role in ensuring a person has been informed of those rights in a way that can be understood. | Online course only |       |
| | **Role of Identified ADL/IADL Needs in Planning:** Understand how Activities of Daily Living (ADL) and Instrumental Activities of Daily Living (IADL) support needs are identified and how this directly informs planning.  
1. Understand what ADL and IADL support needs are and how they are identified.  
2. Understand how the person’s preference, or what is important to the person, informs how ADL and IADL support needs are addressed.  
3. Understand the case management role of addressing support needs and incorporating them into the ISP.  
4. Understand the importance of considering ADL and IADL support needs necessary for the person to accomplish goals that are important to him/her. | Online course only |       |
| | **Natural Supports:** Understand the definition and importance of natural supports, how they are considered when planning, and the role case management can play in promoting development of natural supports.  
1. Understand that "Natural Supports" or "Natural Support System" is defined as the resources available to a person from the person’s relatives, friends, significant others, neighbors, roommates, and the community. Services provided by natural supports are resources that are not paid for by the Department.  
2. Understand the importance of natural supports and their role in improving the quality of a person's life.  
3. Understand the importance of identifying and strengthening natural supports that are available to a person.  
4. Understand tools and resources that can help expand a person's available natural supports (e.g. Relationship map). | Online course only |       |
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| 112. Oregon ISP Process (Part 2): ISP Team, Values, and Self Determination | ISP Team: Understand the definition of an ISP team and the role the team plays in planning with the person and delivery of services. Understand the role that each member of the team plays within the ISP team.  
1. Understand the makeup of the ISP team according to Oregon Administrative Rule (OAR).  
2. Understand the role of the person receiving services and other members within the ISP team.  
3. Understand the role of case management on the team, including as team facilitator and the authorizing authority for funded services. | Online course |   |
|       | ISP Values & Self Determination: Understand the values that drive the Individual Support Planning (ISP) process.  
1. Understand the concept of self-determination and be able to facilitate the ISP process to ensure the person is the leader of his/her plan. Demonstrate ability to identify and support a person's choice preferences.  
2. Understand the concept of self-direction and how it relates to the person exercising self-determination in terms of directing his/her own services.  
3. Understand the importance of supporting people to be productive through engaging in income-producing work or contributing to their household and community. Recognize how the Employment First policy influences planning.  
4. Understand the importance of supporting people to be as independent as possible, considering cultural and family dynamics, the person's preferences, goals, strengths, and needs.  
5. Understand the importance of supporting people to be actively involved members in their communities, while having access to the same services and resources as people without disabilities.  
6. Understand the importance of active engagement to the community as a whole and the role of case management. Consider the benefits of active engagement, combating loneliness, developing a strong social network, and recognizing the person's own definition of active involvement. | Online course only |   |

Online course #___
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| 113. Choice Advising | Understand the case management role in choice advising.  
   1. Understand the definition and importance of choice advising, including deciding who provides case management services.  
   2. Understand the importance of providing information about the array of options available to a person in a manner that is impartial, and as such that the person will not be compelled to elect services offered through any particular agency.  
   3. Understand case management's role in informing a person (and guardian/designated representative, if applicable) of available services, including but not limited to in-home supports, comprehensive service settings, family support, employment/pre-vocational supports, waiver supports, and state plan services.  
   4. Understand and able to fulfill case management's role in informing a person (and guardian/designated representative, if applicable) of the risks and appropriateness of service options chosen.  
   5. Understand and able to fulfill case management's role in choice advising for transition-age adolescents and families, including but not limited to employment options, rights and risks associated with decision making as an adult, state plan services, as well as guardianship/alternative, service setting, and case management options. | Online course  
Reading: DHS Policy Transmittals related to Choice Advising |       |
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| **114. CMS and Stewardship of Public Funds** | **CMS Funds:** Have a basic understanding of the system of delivering services funded by the Centers for Medicare & Medicaid Services (CMS).  
  1. Understand that Oregon Health Authority (OHA) is the designated Medicaid authority in Oregon and oversees waiver and state plan operations.  
  2. Understand ODDS’ responsibility in assuring compliance to waiver and state plan operations.  
  3. Understand case management responsibility in delivery and oversight of waiver and state plan services.  
  4. Understand the purpose of the K Plan.  
  5. Understand the purpose of the Home and Community Based waivers.  
  6. Understand and be able to explain to people and family members the basic concepts of funding of I/DD services in Oregon. | Online course only                                | Online course only |
| **Stewardship:** Understand resourceful stewardship of public funds, and how case management must ultimately answer to the taxpayer. | 1. Understand the case management role in promoting resourceful stewardship of public funds.  
  2. Awareness of other public funded agencies, community organizations, family networks, and other generic programs that offer services to people with I/DD.  
  3. Understand the importance of strengthening a person’s natural networks to reduce reliance on waiver or state plan funded services.  
  4. Understand that services cannot be paid for with waiver, K Plan or state plan funds when a different department or agency has responsibility to provide it. Waiver and state plan funds are the "last dollar" used.  
  5. Able to explain that being eligible for case management services does not automatically make someone eligible for other I/DD services.  
  6. Able to identify specific services which may be purchased with waiver or state plan funds when other agencies also have an involvement in providing services. | Online course only                                | Online course only |
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| 115. Values and History | **DHS Core Values**: Be familiar with the Core Values of Oregon Department of Human Services.  
   1. Know the DHS Core Values of Integrity, Stewardship, Responsibility, Respect and Professionalism. | Online course | Reading: DHS Core Values |
| 115. Values and History | **Values & History**: Understand other values within the Oregon I/DD system.  
   1. Understand that state and federal regulations and programs for people with I/DD are based upon universal human rights and constitutional liberties granted to all.  
   2. Understand the principles of Self-Determination and the importance of seeking the person's choice in guiding the planning process.  
   3. Understand that the least restrictive environment is preferred for both children and adults.  
   4. Understand that systems exists to support people with behavior challenges (Oregon Intervention System (OIS) and Positive Behavior Intervention and Support) which values positive approaches and prohibits punitive actions in behavioral strategies.  
   5. Awareness of historic lawsuits and settlement agreements that have impacted services in Oregon, including the Staley agreement.  
   6. Awareness of the historical use and closure of institutions in Oregon. | Online course only | |
| 116. Confidentiality | **Confidentiality**: Understand the case management responsibility to follow confidentiality standards and be able to cite specific examples of situations that are deemed confidentiality violations.  
   1. Demonstrate ability to prevent breaches in confidentiality.  
   2. Understand case management’s role in maintaining strict confidentiality standards and complying with HIPAA requirements.  
   3. Demonstrate understanding confidentiality expectations through completing a scenario-based assessment.  
   4. Understand your organization’s policies and participate in training on confidentiality and HIPAA. | Online course | Local training: Learn your organization’s confidentiality expectations; training on confidentiality offered by ODDS to foster providers. |
| 116. Confidentiality | | | **Reading**: Oregon Administrative Rules related to Confidentiality; DHS Privacy Practices |
## 117. Qualifying Encounters and Professional Documentation

### Qualifying Encounters: Understand requirements for documented, qualifying encounters for people receiving state plan or waiver services. Understand case management’s role in delivering and documenting required qualifying encounters.

1. Understand what is meant by "qualifying encounters."
2. Understand the minimum contact requirements (qualifying encounters) for case management, in terms of content and timeliness.
3. Know that some contacts occur that are not considered qualifying encounters.
4. Understand the requirements for documenting qualifying encounters.
5. Be able to complete qualifying encounters accurately.

### Professional Documentation: Be able to use basic professional writing skills in all documentation.

1. Understand professional documentation principles including accuracy, objectivity, brevity, and clarity.
2. Demonstrate use of person centered language when writing and ensure the person’s voice is represented accurately and clearly.
3. Be able to effectively complete required written documentation per your organization’s documentation practices.

### Record Keeping Systems: Know the specific forms and/or electronic record-keeping systems that are necessary to complete required documentation.

1. Be familiar with the DHS forms website.
2. Receive training and demonstrate competency in completing documentation according to your organization’s policies and/or procedures.
3. Know the key forms required for use by case management at your organization and how to locate guidance for completing and submitting them. Specific forms include 0337, Level of Care, and others needed for your specific job responsibilities.

### Instructional & Assessment Expectation(s)

- **Online course**
- **Local training:** Guidance on completing qualifying encounters.
- **Physical demonstration:** Demonstrate ability to complete qualifying encounters accurately.
- **Reading:** ODDS Technical Guide
- **Online course**
- **Local training:** Organization’s documentation practices.
- **Physical demonstration:** Demonstrate ability to effectively complete required written documentation.
- **Online course**
- **Local training:** Training on completing required forms; organization’s policies and/or procedures around documentation.
- **Physical demonstration:** Demonstrate ability to complete required forms and documentation.
### Module: Oregon’s Employment First Policy

**Competency Statement & Learning Objectives**

1. Understand Oregon’s Employment First policy, including the Executive Order and Employment First team at DHS, and that your role is to promote Employment First.
2. Understand the case management role in completing the Career Development Plan within the ISP.
3. Awareness of the Discovery process for someone on a path to employment.
4. Awareness that conversations about planning toward employment begin in childhood.
5. Awareness of other employment-related agencies (including VR) and the case management role in coordinating with them.

**Instructional & Assessment Expectation(s)**

- Online course
- **Reading:** Oregon’s Employment First Policy

### Module: Eligibility

**Competency Statement & Learning Objectives**

1. Understand the relationship between eligibility determination and Level of Care.
2. Understand what case management needs to know about how someone is determined eligible.
3. Understand case management’s role when someone is determined ineligible.
4. Understand and be able to identify how eligibility is determined following your organization’s process.

**Instructional & Assessment Expectation(s)**

- Online course
- **Local training:** Understand your organization’s process for determining eligibility (including working with a local eligibility specialist, if applicable).
- **Oral demonstration:** Able to successfully identify how eligibility is determined following your organization’s process.
<table>
<thead>
<tr>
<th>Module</th>
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<th>Notes</th>
</tr>
</thead>
</table>
| 120. Record Keeping    | Understand case management’s role in adhering to the organization’s record keeping requirements.  
  1. Understand the organization’s record keeping requirements and know what you are expected to do to implement them.                                                                                                                      | Local training: Learn your organization’s expectations for record keeping.  
  Physical demonstration: Demonstrate understanding of your organization’s record keeping requirements.                           |                                                                     |
|                        |                                                                                                                                                                                                                                             |                                                                                                              |                                                                     |
| 121. Emergency Response| Understand your organization’s plans in place to mitigate risk and be able to respond as required in case of emergency.  
  1. Awareness of types of natural disasters that may occur in your area and how to connect people with appropriate resources to help them in an emergency.  
  2. Understand your personal responsibility within your organization is if a disaster occurs, including understanding emergency procedures, where to report, and who to call.  
  3. Awareness of OARs regarding emergency preparedness per service element.  
  4. Awareness of specific emergency plans for service providers in your area.  
  5. Awareness of emergency procedures and/or preparedness plans for each person served. Be able to ask "do you have a plan?" or "do you want a plan?" when needed. | Local training: Awareness of your organization’s disaster and emergency preparedness plans and your role.  
  Oral demonstration: Demonstrate understanding of your organization’s plans.  
  Reading: Oregon Administrative Rules regarding emergency preparedness |                                                                     |
|                        |                                                                                                                                                                                                                                             |                                                                                                              |                                                                     |
| 122. Abuse Reporting   | Demonstrate knowledge of and ability to follow the mandatory abuse reporting process. Understand the case management role in providing protective services and assisting with abuse investigations as directed by ODDS.  
  1. Able to identify examples of abuse, neglect, and exploitation.  
  2. Able to explain the mandatory reporting requirements and process for reporting.  
  3. Complete required training for case management produced by the Office of Adult Abuse Prevention and Investigation (OAAPI).                                                        | Local training: Complete training module and quiz published by OAAPI or follow your organization’s expectations.  
  Reading: Oregon Administrative Rules regarding abuse reporting |                                                                     |
<table>
<thead>
<tr>
<th>Module</th>
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<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>123. Level of Care</td>
<td>Understand Level of Care (LOC), why it is completed, and the case management responsibilities related to it.</td>
<td>Other training provided by DHS/ODDS</td>
<td>Local training: Hands on training completing the Level of Care form.</td>
</tr>
<tr>
<td></td>
<td>1. Able to describe significance of Level of Care (LOC), the relationship of LOC to accessing services, and its link to plan development.</td>
<td></td>
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</tr>
<tr>
<td></td>
<td>2. Understand expectations for who is responsible to complete LOC and when.</td>
<td>Physical demonstration: Able to successfully complete the Level of Care.</td>
<td>Reading: Level of Care Assessment Technical Guide (available in the Resources tab of module 119)</td>
</tr>
<tr>
<td></td>
<td>3. Understand expectations to review LOC and responsibilities for assuring that a person's LOC remains accurate and current.</td>
<td></td>
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</tr>
<tr>
<td>124. Needs Assessment</td>
<td>Able to objectively complete a Needs Assessment.</td>
<td>Other training provided by DHS/ODDS</td>
<td>Physical demonstration: Able to successfully complete a Needs Assessment.</td>
</tr>
<tr>
<td></td>
<td>1. Understand that remaining objective is essential while completing an assessment that is specific to the eligible person’s support needs.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>2. Able to complete a needs assessment that is specific to the person's support needs.</td>
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</tr>
<tr>
<td>125. Basic High Risk Issues</td>
<td>Awareness of basic serious, high-risk issues that are commonly encountered in this field.</td>
<td>Other training provided by DHS/ODDS</td>
<td></td>
</tr>
<tr>
<td></td>
<td>1. Awareness of the &quot;fatal four&quot; risks, including aspiration/choking, dehydration, constipation, and seizures.</td>
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</tr>
</tbody>
</table>
SC/PA Core Competencies Tier 2: Must be completed within three months of start date

<table>
<thead>
<tr>
<th>Module</th>
<th>Competency Statement &amp; Learning Objectives</th>
<th>Instructional &amp; Assessment Expectation(s)</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>201. Introduction to Tier 2</td>
<td>Begin Tier 2 by launching this online module. When you finish all of the online and local requirements for Tier 2, return to this module to acknowledge that you have completed all of the training requirements of Tier 2.</td>
<td>Online course only</td>
<td></td>
</tr>
<tr>
<td>202. Individual Support Planning: Services, Desired Outcomes, Risks, and Ancillary Supports</td>
<td><strong>Services:</strong> Understand that a plan must include the types of services to be furnished, the amount, frequency and duration of each service, and the type of provider to furnish each service. 1. Understand that the plan must itemize specific services to be delivered, including frequency, timelines and the chosen provider. 2. Understand that the plan must identify the funding source for all supports provided, including Activities of Daily Living (ADL) and Instrumental Activities of Daily Living (IADL) supports. 3. Understand Oregon’s ISP process. 4. A person’s ISP must be revised at least annually. It is case management’s role to ensure that planning happens in accordance with required timelines. 5. Understand how Level of Care and the needs assessment lead to the ISP. 6. Understand the case management role in ensuring that the ISP meets any requirements defined by the funding source(s). Example: K plan services provided must meet requirements as approved by CMS for Oregon’s 1915 (k) plan. 7. Be able to complete an ISP according to the requirements of Oregon’s ISP process.</td>
<td>Online course</td>
<td><strong>Local training:</strong> Training on completing an ISP. <strong>Physical demonstration:</strong> Demonstrate ability to complete an ISP.</td>
</tr>
<tr>
<td>Desired Outcomes: Understand and be able to fulfill the case management role in facilitating the development of meaningful and measurable outcomes within a person’s Individual Support Plan (ISP). 1. Able to facilitate conversations that result in meaningful outcomes driven by the balance between what is important to and for a person. 2. Able to identify what is important to and for the person regarding independence, dignity and well-being so that plans can focus on the person getting the life he/she chooses. 3. Recognize the importance of thinking about long-term goals as well as short-term planning needs. 4. Understand the importance of including a plan for evaluating progress toward accomplishing the identified meaningful and measurable outcomes. 5. Awareness of person centered tools that can help identify goals, dreams, or things to work on (e.g. PATHs, MAPs, relationship maps, etc.). 6. Able to use information gathered while planning with the ISP team to write meaningful, measurable outcomes into the ISP.</td>
<td>Online course</td>
<td><strong>Physical demonstration:</strong> Demonstrate ability to complete action plans with meaningful, measurable outcomes.</td>
<td></td>
</tr>
</tbody>
</table>
### SC/PA Core Competencies Tier 2: Must be completed within three months of start date

<table>
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</tr>
</thead>
</table>
| (202 continued) | **Risks:** Understand the case management role of identifying risks and following through to ensure that appropriate supports are offered.  
  1. Understand the risk assessment tool used in Oregon’s ISP and the case management role in completing it.  
  2. Understand the importance of having a plan and a back-up plan to address identified risks present in the person's life.  
  3. Be familiar with various types of support documents, including protocols, safety plans, behavior support plans, staff interaction guidelines, procedures, and more.  
  4. Understand the person's right to direct how risks are addressed. Ensure the person and families are offered information about risks and choices in an accessible and meaningful way.  
  5. Understand case management's requirement to meet reporting standards: identified individual risk and safety considerations are addressed taking into account the person’s informed and expressed choices.  
  6. Know when to ask for help from your supervisor or from ODDS.  
  7. Be able to complete the ISP showing identification of risks and plans in place to address risks. | **Online course**  
 **Physical demonstration:** Able to complete ISP showing identification of risks and plans in place to address the risk. |       |
|       | **Ancillary Supports:** Able to connect people to various ancillary supports that may be useful when planning and include in the ISP when necessary.  
  1. Awareness of common mental health issues and basic understanding of indicators that further evaluation may be needed.  
  2. Awareness of various identified ancillary services (below) and when they may be beneficial to people.  
  3. Able to connect people to ancillary services as needed.  
  - Speech pathology, OT/PT, nursing services  
  - Mental Health support services such as counseling, psychiatric services, substance abuse treatment and prevention, trauma-informed services  
  - Positive Behavior Intervention and Supports and the role of a behavior specialist or behavior consultant  
  - ODDS' Assistive Technology Discussion Tool and resource guide  
  4. Be able to discuss scenarios when ancillary supports may be effective. | **Online course**  
 **Oral demonstration:** Discussion with colleague about scenarios when ancillary supports may be effective. |       |

Revised 1/27/17
### SC/PA Core Competencies Tier 2: Must be completed within three months of start date

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<tr>
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</tr>
</thead>
</table>
| 203. Guardianships and Informed Consent | **Guardianships:** Demonstrate an understanding of the key differences between various types of legal guardianships and their specific scopes of authority over a person’s choice.  
1. Have a basic understanding of guardianship proceedings and how a guardianship is assigned.  
2. Understand the legal definition of "incapacitated person." ORS 125.060 through ORS 125.080.  
3. Have a basic understanding of the key differences between various types of legal guardianships, their scopes and limitations of authority over a person’s choice.  
4. Have an awareness of what a health care representative is, when it can be helpful, how one can be appointed, and how to connect with the required training provided by DHS.  
5. Have an awareness of what a representative payee is, when it can be helpful and how one can be appointed (Link to SSA).  
6. Understand that conflicts sometimes arise between what the person wants and what the guardian directs. When this happens, it may be helpful to discuss the issue with your supervisor for guidance.  

**Informed Consent:** Understand what informed consent means and case management's role in obtaining it.  
1. Understand the definition of informed consent as it pertains to ODDS.  
2. Understand case management’s role in obtaining and documenting informed consent from the person around matters of choosing services, planning, and other situations where informed consent is required.  
3. Understand options available if a person is determined unable to give informed consent.  
4. Able to help assess whether a person's ability to give informed consent needs to be adjudicated.  

<table>
<thead>
<tr>
<th>Online course #___</th>
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<tr>
<td></td>
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|                  | **Informed Consent:** Understand what informed consent means and case management's role in obtaining it.  
1. Understand the definition of informed consent as it pertains to ODDS.  
2. Understand case management’s role in obtaining and documenting informed consent from the person around matters of choosing services, planning, and other situations where informed consent is required.  
3. Understand options available if a person is determined unable to give informed consent.  
4. Able to help assess whether a person's ability to give informed consent needs to be adjudicated. | **Online course** | **Online course** | **Notes** |
| 204. Balancing Risks and Choice | **Online course** | **Local training:** Conversation with supervisor about responsibilities to address risk.  
**Reading:** Thinking about Risk by Michael Smull | **Notes** |
### SC/PA Core Competencies Tier 2: Must be completed within three months of start date

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</thead>
</table>
| 205. Monitoring, Follow up, and Ensuring Honesty | **Monitoring**: Understand the case management responsibilities associated with monitoring, including routine monitoring tasks, frequency, documentation requirements, triggers for increased monitoring, and the importance of following up when action is necessary.  
1. Understand the purpose of monitoring and the required tasks associated with it, including monitoring progress toward outcomes of ISPs and services being delivered.  
2. Understand the required minimum monitoring frequencies.  
3. Understand concept of “closing the loop” and the importance of following up to seek improvement and resolution of identified issues.  
4. Understand tools that can be used to assist with monitoring.  
5. Demonstrate ability to identify, communicate, document, and follow-up on issues found during monitoring.  
6. Understand the responsibilities for monitoring of individual finances.  
7. Understand expectations when monitoring and able to demonstrate monitoring with supervisor or colleague. | Online course | Local training: Local conversation about expectations when monitoring.  
Physical demonstration: Participate in monitoring visits with supervisor or colleague and receive feedback. |

| | Following Up with Providers: Understand case management responsibilities when providers are not meeting expectations.  
1. Understand the role of case management as it relates to licensing and regulatory oversight of providers.  
2. Understand the role of case management in following up on provider licensing citations when required.  
3. Be familiar with situations when observations must be reported to the Office of Licensing and Regulatory Oversight.  
4. Understand the case management role in seeking improvement and resolution of identified areas of concern.  
5. Be able to demonstrate understanding of how to respond when providers are not meeting expectations. | Online course | Local training: Conversation with supervisor about situations where supervisor wishes to be notified.  
Oral demonstration: Demonstrate understanding of how to respond when providers are not meeting expectations. |

| | Ensuring Honesty and Integrity: Understand the responsibilities inherent in ensuring honesty and integrity from assessment through planning and delivery of services.  
1. Understand what constitutes Medicaid fraud.  
2. Understand the importance of honesty and integrity in all case management tasks.  
3. Understand the case management role when fraud or unethical behavior is suspected or observed. | Online course only | |
### SC/PA Core Competencies Tier 2: Must be completed within three months of start date

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<tr>
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</thead>
</table>
| **206. Transitions** | Understand case management’s role in facilitating various types of transitions.  
1. Understand the case management role in ensuring continuity of care when facilitating transitions.  
   - Transition point: Starting school. Specific issues to be aware of, typical timelines, etc.  
   - Transition point: Preparing for future employment. Know that planning toward employment begins in childhood. Additional planning continues around age 14. Discovery processes and gathering information about the person’s abilities and choices.  
   - Transition point: Leaving school. Specific issues to be aware of, typical timelines, etc.  
   - Transition point: Changing providers. Specific issues to be aware of, typical timelines, etc.  
   - Transition point: Moving between CDDP and Brokerage services. Specific issues to be aware of, typical timelines, etc.  
   - Transition point: Changing counties. Specific issues to be aware of, typical timelines, referral process, transition checklist, etc.  
   - Transition point: Retirement, leaving work. Specific issues to be aware of, typical timelines, how to plan, etc.  
2. Understand your organization’s transition checklist or procedures, if applicable. | Online course | Local training: Training on your organization’s transition checklist or procedures, if applicable. |
| **207. Cultural Sensitivity** | Understand basic cultural sensitivity as it applies to the role of case management.  
1. Awareness that case management will interact with a diverse population.  
2. Know what training your organization provides in cultural competency and complete this. | Online course | Local training: Your organization’s cultural competency training. Oral demonstration: Conversation with supervisor or colleague about specific cultural considerations at your organization. |
| **208. eXPRS Plan of Care** | Knowledge of the case management role in eXPRS Plan of Care.  
1. Understand the case management role in eXPRS Plan of Care.  
2. Understand your organization’s procedure for inputting information into eXPRS Plan of Care. | Local training: Learn your organization’s procedure for inputting information to eXPRS Plan of Care. Learn ODDS expectations for information inputted to eXPRS Plan of Care.  
Physical demonstration: Demonstrate understanding of procedures for inputting information into eXPRS Plan of Care. | Local only |
Core Competencies for Services Coordinators and Personal Agents

Local Training Expectations

Local training can be provided by a trainer or supervisor at your agency, a course developed and trained by someone outside your agency, or reading requirements of your agency. Many modules include an online course as well as local training. This list identifies which modules require local training. A module identifying local training below may also require online training. The SC/PA Master list of competency statements, instructional and assessment methods is an inclusive list of both on – line and local training requirements.

Tier 1

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<thead>
<tr>
<th>Module #</th>
<th>Local Instructional Expectations</th>
</tr>
</thead>
<tbody>
<tr>
<td>102</td>
<td>Training on your organization’s expectations; policies, and procedures; personal safety on the job</td>
</tr>
<tr>
<td>104</td>
<td>Training on your organization’s complaint policies</td>
</tr>
<tr>
<td>106</td>
<td>Learn your organization’s expectations for initial and ongoing training</td>
</tr>
<tr>
<td>110</td>
<td>Learn how to complete required forms (Reporting Serious Events)</td>
</tr>
<tr>
<td>116</td>
<td>Learn your organization’s confidentiality expectations; training on confidentiality offered by ODDS to foster providers</td>
</tr>
<tr>
<td>117</td>
<td>Local guidance on completing qualifying encounters Organizations documentation practices Training on completing required forms: organization’s policies and/or procedures around documentation</td>
</tr>
<tr>
<td>119</td>
<td>Understand your organization’s process for determining eligibility (including working with a local eligibility specialist, if applicable</td>
</tr>
<tr>
<td>120</td>
<td>Learn your organization’s expectations for record keeping</td>
</tr>
<tr>
<td>121</td>
<td>Awareness of your organization’s disaster and emergency preparedness plans and your role</td>
</tr>
<tr>
<td>122</td>
<td>Complete training module and quiz published by OAAPRI or follow your organization’s expectations on reporting abuse</td>
</tr>
<tr>
<td>123</td>
<td>Hands on training completing the Level of Care form</td>
</tr>
<tr>
<td>124</td>
<td>Needs assessment training provided by ODDS or other delegated entity</td>
</tr>
<tr>
<td>Module #</td>
<td>Local Instructional Expectations</td>
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</tr>
<tr>
<td>202</td>
<td>Training on completing an ISP</td>
</tr>
<tr>
<td>204</td>
<td>Conversation with supervisor about responsibilities to address risks</td>
</tr>
<tr>
<td>205</td>
<td>Local conversation about expectations when monitoring Conversation with supervisor about situations where a supervisor wishes to be notified</td>
</tr>
<tr>
<td>206</td>
<td>Training on your organization’s transition checklist or procedures, if applicable</td>
</tr>
<tr>
<td>207</td>
<td>Participating in your organization’s cultural competency training</td>
</tr>
<tr>
<td>208</td>
<td>Learn your organization’s procedure for inputting information into eXPRS Plan of Care. Learn ODDS expectations for information inputted to eXPRS Plan of Care</td>
</tr>
</tbody>
</table>
How do I check my transcripts/training records?
DHS|OHA Learning Center vs. iLearnOregon

Compare your Learning Center training records to your iLearnOregon transcript to make sure all your courses transferred.

What do the transcripts look like?

Once in the Learning Center, click Training Records. All your courses and curriculums, both completed and started, are shown on a single list, including Outside Training that you added to the transcript.

In iLearnOregon, click Transcript. All your courses and curriculums, both completed and started, are on a single list called All My Learning, including Outside Training (which iLearn calls Self Reported Learning). You also have the option to see just part of your transcript by selecting one of the buttons: Curriculums, Self Reported Learning, Certifications and Self Reported Certifications.
DD Partner Instructions for:

- Brokerages
- Community Developmental Disability Programs
- Service Providers
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How to create a new account ...................................................................................................... 9
iLearnOregon (iLearn) is the new training site replacing the Department of Human Services (DHS) Learning Center in 2016. This guide provides information for Developmental Disabilities (DD) Partners who access trainings through the DHS Office of Developmental Disabilities Services. This includes staff at Brokerages and Community Developmental Disability Programs (CDDP) and Service Providers.

**Website:** [https://ilearn.oregon.gov/](https://ilearn.oregon.gov/)

### First-time Login Instructions

If you used the Learning Center before 6/24/2016, a user account has been created for you in iLearn. For example, you may have previously used the Learning Center to register for the SC/PA conference. If this is the case, your Login ID for iLearn will be the same one you used in the Learning Center. The first time you log in to iLearn, use the temporary password “temp1234” and then set up your permanent password.

If you have not used these systems, you can create an account on the iLearn homepage by clicking on “Create Account” in the upper right-hand corner of the website. Go to page 9 for further instructions on creating a new account.

Use the table below for more information on getting started in iLearn. If you have more than one account, email [dhs.training@state.or.us](mailto:dhs.training@state.or.us) to have them combined.

<table>
<thead>
<tr>
<th>Type of user</th>
<th>iLearn Login</th>
<th>iLearn Password</th>
</tr>
</thead>
<tbody>
<tr>
<td>If you used the Learning Center before 6/24/2016.</td>
<td>Use your Learning Center login.</td>
<td>temp1234 (all lowercase)</td>
</tr>
<tr>
<td>If you created a Learning Center account after 6/24/2016.</td>
<td>You will need to create a new account in iLearn.</td>
<td>You will need to create a new account in iLearn.</td>
</tr>
<tr>
<td>If you don’t have a Learning Center account.</td>
<td>You will need to create a new account in iLearn.</td>
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</tr>
<tr>
<td>If you’ve used iLearn before.</td>
<td>Use your iLearn login ID.</td>
<td>Use your iLearnOregon password.</td>
</tr>
</tbody>
</table>

**NOTE:** Learning Center training records will move to iLearn in November of 2016.
Update your iLearnOregon Account

Once you’ve logged in to iLearn, follow these instructions to update your account.

Open Your Account Page

1. Follow this link to access iLearn https://ilearn.oregon.gov and log in.

2. On your Learning Home page, click on My Account. It’s under your name on the upper right of the screen.

Password change

3. Follow these steps to change your password.
   NOTE: You’ll be asked to change your password the first time you log in.

4. Click on Edit Password

5. In the new window, enter your current password. Then enter your new password and click the Save button.
Update Name and Email Address

1. On the **User Information** box from the My Account page, click the **Edit** button.

2. In the new screen, update your **First** and **Last** name.

   **NOTE:** This is how your name appears on training records, sign-in sheets and certificates.

3. Update your **Email Address** and click the **Save** button.

Turn on Messages

iLearn can send you training messages. Examples:

- When you’ve signed up for a training
- Training is cancelled or the location has changed
- An instructor needs to email you
- You were on a waitlist and are now registered

**NOTE:** You need to turn on email messages and enter an email address in your profile.

1. On the **Preferences** box from the My Account page, click the **Edit** button.

2. In the new screen, **check** the box next to **Send messages to my email address (as shown in my profile)** and click the **Save** button.
Update Work Information

Make sure you have access to training offered by the Department of Human Services. Update your Work Information.

1. On the Work Information box from the My Account page, click the Edit button.

2. In the new screen, click on Select under Organization.

3. In the new screen, type Human Services in the Find Organization box and click the Search button. Select Department of Human Services Partners and click Save.

4. You will now be back in the Work Information box. Click Save again.
NOTE: The rest of the Work Information section is optional. If you fill out Company, Company Address etc., make sure you update it if you change jobs.

Do not enter your Manager’s name; this is for State employees only.

Set Password Questions

If you forget your iLearn password, you can reset it on the login page by clicking Forgot your password?

iLearn will ask you to answer your security questions. Be sure to set the security questions the first time you log in. If you forget your username or password, you can also contact the Service Desk at 503-945-5623 or dhs.servicedesk@state.or.us.

1. Log into iLearn.

2. On your homepage, click on My Account. It’s under your name on the upper right of the screen.

3. Click on Edit Security Questions.

4. For each of the drop downs, choose one Question to answer. Type the answer to each question in the matching answer box. When you’re finished, click Save.
How to find a course

Search the Learning Catalog

You can search for courses in iLearn from (1) the search box on your Learning Home homepage or (2) the Browse Learning Catalog search box on the Learning Catalog menu.

1. From either tab, use the search box to enter the course name, course number or keyword and click the Search button.

   - Using All Words makes it easier to find what you need.

2. This will bring up a list of all content in iLearn that matches your search. Click any item to find out more information and register.
NOTE: Classes offered by the Department of Human Services all begin with **DHS**. All ODDS courses should follow the title convention: **DHS – DD – Course Name**. Searching for the exact phrase keyword “DHS – DD” will yield all of the courses offered by ODDS.

**DD Course examples**

Below are two examples of DD trainings that are available for partners.

1. **DD QA Case Management Services Training**
   To find in-person classroom style Quality Assurance case management trainings for Services Coordinators and Personal Agents, search for keyword, “I/DD”.

2. **DD Core Competency Online Training Modules**
   To find online eLearning Core Competency training modules for Services Coordinators and Personal Agents, search for keyword “SC/PA”. There are additional Core Competency modules designed for Direct Service Providers. Search for these using keyword, “DSP”.

**How to create a new account**

1. Go to the iLearn website: [https://ilearn.oregon.gov](https://ilearn.oregon.gov)

2. On the iLearn login page, click **Create New Account**. This will take you to the User Information page.
Complete the User Information page using the information below.

**Type:** Not a State Employee  

**First Name:** Your first name  

**Last Name:** Your last name  

**Email:** Your e-mail address (each email account can only be used for one account in iLearn)  

**Login ID:** Choose a Login ID... it must be a least 6 characters and cannot contain spaces or characters such as /, @, or &.  

**Job Title:** Leave blank  

**Organization:** Select Human Services, Department of  

Another drop-down menu will appear for Partners. Select your partner organization; choose Department of Human Services Partners.  

**Manager:** Leave blank  

3. Click the green Submit button. You have created a new account. You will receive an email with a temporary password. The temporary password in this email is only valid for 24 hours. Please log in and update your password promptly.

**Congratulations on getting started with iLearn!**

For password resets or help retrieving your Login ID, contact the DHS Service Desk at 503-945-5623 or dhs.servicedesk@state.or.us.  

For further assistance using the iLearn system, please email dhs.training@state.or.us.