

**Developmental Disabilities Services**

Lilia Teninty

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**Number: APD-IM-18-079**

**Issue date: 10/19/2018**

**Topic:** developmental disabilities

**Subject:** Oregon Needs Assessment (ONA) participation and follow up

**Applies to (check all that apply):**

- |  |   |
|--|---|
| <input type="checkbox"/> All DHS employees                               | <input type="checkbox"/> County Mental Health Directors   |
| <input type="checkbox"/> Area Agencies on Aging                          | <input type="checkbox"/> Health Services  |
| <input type="checkbox"/> Aging and People with Disabilities              | <input checked="" type="checkbox"/> Office of Developmental Disabilities Services(ODDS)   |
| <input type="checkbox"/> Self Sufficiency Programs                       | <input checked="" type="checkbox"/> ODDS Children's Intensive In Home Services  |
| <input checked="" type="checkbox"/> County DD Program Managers           | <input checked="" type="checkbox"/> Stabilization and Crisis Unit (SACU)  |
| <input checked="" type="checkbox"/> ODDS Children's Residential Services | <input checked="" type="checkbox"/> Other ( <i>please specify</i> ): Brokerage managers, Case managers, DD providers, and ONA assessors |
| <input type="checkbox"/> Child Welfare Programs                          |   |

**Message:** The intent of this transmittal is to clarify the best practices and requirements regarding who participates in the Oregon Needs Assessment (ONA) interview, what documentation is used, who fills out the ONA, and who receives copies of the completed ONA.

**Participating in the ONA interview:**

The trained and authorized ONA assessor is required to have a face-to-face meeting with the individual. This may happen at the same time as the ONA interview or may happen separate from the ONA interview. The individual and his/her guardian must be invited to the ONA interview. The individual's services coordinator or personal agent should help the individual choose the appropriate people to participate in the ONA interview, but ultimately it is the individual's choice. The best practice is to have those who provide services for the individual present at the ONA interview, however if they are not able to attend or if the individual does not want them to attend the ONA assessor may contact them separately to obtain information about supports provided.

If the person has residential services (SE50, SE141, SE142, SE 158, SE258, or SE51) the ONA assessor must get input from the provider (either during or outside of the ONA interview) prior to completing the ONA.

The ONA interview is intended to be conversational. While each assessor may have a different conversational style, they will be asking questions that may or may not appear on the ONA to gain information about the individual's support needs. Respondents in the interview are encouraged to discuss the individual's support needs in a respectful manner. The interview isn't intended to be a group consensus on how each support item should be rated. Respondents should describe how the person receives supports, but not attempt to score the item.

### **Reviewing Documentation:**

The ONA assessor is required to review the individual's documentation. The assessor will review documents that are likely to give information that is relevant to the questions in the ONA. If the individual has any of these documents the assessor should be reviewing them: ISP, PBSP, Nursing care plans, Protocols, Risk Identification Tool, monthly reports and behavior summaries. ONA assessors are not expected to read an entire file or read all the progress notes or incident reports in an individual's file. If there are notes, reports, or documents that the person's ISP team believes are particularly relevant, they should make the ONA assessor aware of those items. Typically, the ONA assessor reviews the case manager's file. If the providers have documents that are significantly different from the CM, they should provide those documents to the assessor.

### **Filling out the ONA:**

Only the trained and authorized ONA assessor may fill out the ONA. The ONA is the professional judgement of the ONA assessor who (with consideration of the interview, face-to-face meeting, documentation review, and follow up conversations), marks the ONA based on the guidance and training they have received from ODDS.

No respondents should attempt to fill out the ONA before or during the ONA interview. The ONA assessor should not be reviewing paper ONAs completed by respondents.

### **Copies of completed ONAs:**

The CME can view the ONA in eXPRS. They are not required to print a copy of the ONA for their files. If the individual and/or guardian request a copy of the ONA, the CME must give them a copy (the ONA report, when it is available, may be offered as an alternative). Residential providers (SE50, SE141, SE142, SE 158, SE258, or SE51) must be given a printed copy of the ONA (or ONA report, when available) by the CME upon request. The individual may provide a copy to anyone they wish.

*If you have any questions about this information, contact:*

<b>Contact(s):</b>	Fred Jabin		
<b>Phone:</b>	503-945-6409		
<b>Email:</b>	<a href="mailto:fred.c.jabin@state.or.us">fred.c.jabin@state.or.us</a>		