

Lilia Teninty

**Authorized Signature**

**Number:** APD-PT-15-012

**Issue date:** 4/2/2015

**Topic:** Developmental Disabilities

**Transmitting (check the box that best applies):**

- New policy   
  Policy change   
  Policy clarification   
  Executive letter  
 Administrative Rule   
  Manual update   
  Other: \_\_\_\_\_

**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 type="checkbox"/> ODDS Children's Intensive In Home Services                     |
| <input checked="" type="checkbox"/> County DD Program Managers | <input type="checkbox"/> Stabilization and Crisis Unit (SACU)                           |
| <input type="checkbox"/> ODDS Children's Residential Services  | <input type="checkbox"/> Other (please specify):                                        |
| <input type="checkbox"/> Child Welfare Programs                |                                                                                         |

Policy/rule title:	Annual Functional Needs Assessment		
Policy/rule number(s):	OAR 411-320-0120	Release no:	
Effective date:	04/03/2015	Expiration:	
References:	STATE PLAN UNDER TITLE XIX OF THE SOCIAL SECURITY ACT Community First Choice State Plan Option APD-PT-15-003		
Web address:			

**Discussion/interpretation:**

It has been requested that Services Coordinators be allowed to conduct Adult Needs Assessments (ANA) for individuals enrolled in DD50 services, if the individual does not also need a SIS assessment. It may take less time and allow for a smoother transition to planning if the Services coordinators conducted those ANAs.

The plan for completing annual functional needs assessment (as required by CMS) is explained in detail in policy transmittal APD-PT-15-003. This policy transmittal will ammend the section of policy transmittal APD-PT-15-003 pertaining to those who

receive DD50 services (no other service element is effected.)

For individuals in DD50 whose teams have indicated that they only need an ANA and have not had a significant change in needs and do not need a SIS assessment this year, the individual's services coordinator and/or the CDDP may choose to conduct the ANA assessment (if they have passed the ANA test and are qualified to conduct an ANA.)

Assessment Specialists from the ReBAR assessment unit will conduct all the ANAs and SIS assessments for those who need a SIS assessment.

**Implementation/transition instructions:**

CDDPs will continue to follow the DD50 steps for scheduling an ANA or ANA/SIS (revised copy attached). If the individual needs a SIS assessment, the assessment unit (ReBAR) will conduct both the SIS and the ANA. CDDPs will continue to schedule the SIS assessments (using the familiar procedure that has been used in scheduling SIS assessments, and is outlined in the attached steps document.) If the individual does not need a SIS assessment, the CDDP may choose to conduct the ANA and if they choose to conduct it, they will indicate this by marking "will be conducted by CDDP" in the "other information" column of the spreadsheet they received from (and return to) the assessment unit. If the CDDP indicated they would conduct the ANA they will schedule the ANA. If the CDDP did not indicate that they would conduct the ANA (and did not indicate the need for a SIS) then the assessment unit will schedule and conduct the ANA.

**Training/communication plan:**

CDDPs should communicate with the individual's team to determine if a SIS assessment is warranted and determine who will be conducting the ANA if the SIS is not warranted.

CDDPs may ask for specific training on the scheduling process by contacting Fred Jabin ([fred.c.jabin@state.or.us](mailto:fred.c.jabin@state.or.us) or 503-945-6409)

To qualify to conduct an ANA assessment, one must pass the ANA test that is available on the learning center or after an in person ANA training. ODDS highly recommends that assessors attend an in person training. CDDPs can request a training or find a training by contacting Linda Darr ([linda.darr@state.or.us](mailto:linda.darr@state.or.us) or 541-324-4387)

**Local/branch action required:**

**Central office action required:**

**Field/stakeholder review:**     Yes     No

**If yes, reviewed by:**    CDDP managers

**Filing instructions:**

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

<b>Contact(s):</b>	Fred Jabin		
<b>Phone:</b>	503-945-6409	<b>Fax:</b>	503-945-5905
<b>Email:</b>	fred.c.jabin@state.or.us		

OBSOLETE

DD50 Steps for scheduling an ANA or an ANA/SIS assessment.

Step 1: ReBAR assessors will send each county a list of individuals with upcoming assessment needs based on the ISP dates counties submitted.

The list will be sent out every 2 months and will be used for upcoming months

- February 2015 ReBAR will send out list for people with ISP dates in April and May
- April 2015 ReBAR will send out list for people with ISP dates in June and July
- June 2015 ReBAR will send out list for people with ISP dates in August and September
- August 2015 ReBAR will send out list for people with ISP dates in October and November
- October 2015 ReBAR will send out list for people with ISP dates in November and Dec.
- Nov. 2015 ReBAR will send out list for people with ISP dates in Jan/Feb/March 2016

Step 2: CDDPs will mark which of the upcoming individuals need a SIS assessment in addition to the ANA assessment. In the “other information” column CDDPs will indicate if they will be conducting the ANA for individuals who do not need a SIS assessment, by marking “will be conducted by CDDP”. The CDDP will return the list to the SIS assessor.

Step 3: ReBAR assessors will send counties a list of available dates to complete the SIS/ANA assessments.

Step 4: ReBAR assessors will contact counties to set up a time to review files for upcoming assessments.

Step 5: Counties will schedule the meetings for the SIS/ANA assessment on the “available dates” list. The SC (or designated county contact) will schedule the meeting room, and invite all the participants.

Step 6: ReBAR assessors will contact providers to set up meetings for individuals who only need an ANA assessment.

Step 7: ReBAR assessors conduct assessment at appointed time

Step 8: If ANA assessment indicates significantly different supports than the most recent SIS, A new SIS assessment will be scheduled.